SharePoint User Manual

Developed By

The CCAP SharePoint Team

Revision: 10/2009

TABLE OF CONTENTS

SECTION 1 7

ABOUT SHAREPOINT 7

1. What is Microsoft Office SharePoint Server (MOSS or SharePoint)? 7
2. SharePoint Sites 7
3. SharePoint Security 7
4. SharePoint Roles And Permissions 8
5. SharePoint Workflow 8
6. SharePoint Templates 8
7. SharePoint Web parts 8
8. Audience Targeting 8
9. Metadata 9

SECTION 2 11

VISITORS 11

1. Public Access (Anonymous Access) 11
2. Why Have Users Register For Your Site? 11

SECTION 3 13

REGISTERED USERS 13

1. Registration Feature 13
2. Registering for the Site 13
3. Signing In 14

SECTION 4 15

MANAGING YOUR PASSWORDS 15

1. Forgot My Password Feature 15
2. Change My Password Feature 16

SECTION 5 17

AUDIENCE TARGETING 17

1. Audience Targeting 17
2. Examples Of Audience Targeting 17

SECTION 6 19

STYLES AND CONSISTENCY THROUGH USING CSS 19

1. CSS (Cascading Style Sheets) 19
2. Applying CSS / Style 19

SECTION 7 21

WHERE ARE FILES STORED IN SHAREPOINT? 21

1. Document Libraries 21
2. Document Library Best Practice 21
3. Lists 21
4. Lists Best Practices 21

SECTION 8 23

MANAGE CONTENT AND STRUCTURE 23

1. How To Access Your Document Libraries and Lists 23
2. Option 1: Manage Content and Structure 23
3. Option 2: View All Site Content 25

SECTION 9 27

UPLOADING FILES 27

1. Uploading via "View All Site Content" 27
2. Copying the Link Of Your Uploaded File 28

SECTION 10 29

CREATING PAGES 29

1. Creating A New Page 29

SECTION 11 31

DESIGNING & EDITING PAGES 31

1. Designing a Page 31
2. Web Parts 31
3. The Content Editor Web Part 32
4. The Summary Link Web Part 35
5. The Image Web Part 38
6. Editing A Page 40

SECTION 12 41

FINDING FILES/PAGES LAST MODIFIED BY YOU 41

SECTION 13 43

APPROVING A PAGE 43

1. How Do I Know I Have To Approve An Item? 43

SECTION 14 45

CREATING LISTS & CALENDARS 45

1. CREATING A LIST 45
2. CHANGING A LIST SETTINGS 46
3. USING METADATA IN DOCUMENT LIBRARIES 48
2. CREATING VIEWS ON LISTS 48
3. USING THE VIEWS YOU CREATE 49

SECTION 15 51

SETTING UP WORKFLOW ON A LIST OR CALENDAR 51

1. WHAT IS WORKFLOW 51
2. EXAMPLES OF WORKFLOW (APPROVAL OF CONTENT) 51

A. CALENDARS 51
B. DISCUSSION BOARDS 51
C. OTHERS LISTS 51

3. PLACING WORKFLOW ON AN ITEM 51

SECTION 16 53

FEATURES YOU CAN USE 53

1. ALERTS 53
2. HELP DESK TRACKING 56

SECTION 17 57

EXAMPLES OF THINGS TO DO 57

SECTION 1

ABOUT SHAREPOINT

1. What is Microsoft Office SharePoint Server (MOSS or SharePoint)?

a. Microsoft Office SharePoint Server 2007 is an integrated suite that includes:
   1. Comprehensive content management
   2. Enterprise search
   3. Workflow (business processes such as on-line and automated forms) a
   4. Collaboration
   5. Ability to turn information to knowledge (business intelligence)

b. Why SharePoint?
   1. SharePoint is a very flexible solution with a vast amount of capability.
   2. Applications can be provided across SharePoint fairly easily to collect aggregate data and return that data in a common format.
   3. With given workflow, approvals can be set up to allow various internal or even external registered users the ability to submit data, files, feedback, etc.
   4. With appropriate rights, a user can setup (with or without approval of posting the content):
      (1) Surveys
      (2) Forums or discussions boards
      (3) Lists (that can also serve like a software program to collect data)
   5. On-line forms can be setup to help streamline business transactions

2. SharePoint Sites

a. A site or subsite is a contextually based and directly correlates with its respective site collection. As examples:
   1. http://www.countysite.com/MembersOnly
   2. http://www.countysite.com/department
   3. http://www.countysite.com/courts

b. You would use sites to support departmental or content processes. (For example, you could set up a 'members only' site and secure this specifically, or you can setup a 'HR' departmental site and have specific workflow for that site.)

3. SharePoint Security

a. SharePoint has Groups, Permissions and Users.
b. Permissions assigned determine what a user can do with SharePoint sites/pages.
c. Permissions are setup per site and per group.
d. A best practice is that you setup groups, add users to groups. (It is recommended NOT to assign permissions to individual pages or users as it is too hard to track.)

4. SharePoint Roles And Permissions

a. Roles are created to group users into like functions.
b. Most Common Roles/Groups include:

1. **Content Owner:** Administrative ability (assign approvers, managers, etc.), can view, add, update, delete, approve, and customize permissions, pages and site. (Only Tech Staff)
2. **Content Approver:** Can view, edit and approve pages, list items, and documents.
3. **Content Designer:** Can view, add, update, delete, approve, and customize.
4. **Content Manager:** Can edit content.
5. **Viewers/Visitor:** Can view only.
6. **Members:** Can view only. Can view specific lists, document libraries, list items, folders, or documents when given permissions.

5. SharePoint Workflow

a. Workflow can be setup "behind the scenes" to enable automated business processes.
b. An example is the new approval process. This process is to support consistency in public content.
c. Another example could be a form that one would fill out. The data would then be e-mailed directly to the appropriate person and get stored where it is supposed to be.
d. Workflow would be set up by the technology department.

6. SharePoint Templates

a. CCAP has developed custom templates that will meet the needs of most sites you will build.
b. Templates offer the ability to have consistent layouts throughout your entire site.
c. In addition to the templates there are multiple CSS files that can be applied against these templates to allow for consistent fonts; colors, etc. throughout your site.(see information on CSS later in this manual).

7. SharePoint Web parts

a. Web parts are like little programs that allow different functions on a Web page.
b. Web parts are generally already added into Templates. If you are a "Content Designer" you will have the ability to add these to your page.

8. Audience Targeting

a. Audience targeting is a way to only show content to a specific group of people.
b. This would be setup based on groups (mentioned in number 5. Above)
c. For example, let's say you have a Members section on your Web site and you only want that tab to show to users who are assigned as "members only" role. You would then 'audience target' that item to 'members only' and they would be the only users who see that tab.

9. Metadata

a. **What is Metadata?**
   1. Data about data (word that describe your information)
   2. Metadata is information about an informational resource, be that a document (such as a webpage), image, dataset or other resource.
   3. Think of the metadata as being similar to that of using the "folder structure". Instead of putting documents, etc. in folders, you are placing those descriptors as metadata tags on the document itself.

b. **Why use Metadata?**
   1. Resources supported by good quality, structured metadata are more easily discoverable.
   2. Policies can be set up to automate records retention and workflow based on metadata.
   3. Metadata is valuable in the storage and retrieval of information.

c. **Examples of Metadata**
   1. Department
   2. Month
   3. Year
   4. Author

VISITORS

1. Public Access (Anonymous Access)

a. Most content on a site will be publically available for anyone (none registered user) to view.
b. Anyone can register for the Web site.
c. Once they register, they are put into a 'Visitors Group' which still only allows them access to what is considered anonymous accessible information.

2. Why Have Users Register For Your Site?

a. Visitors (anonymous access) can see only the content that does not have any special permissions or "audience targeting" specified.
b. A visitor is able to register as a user for the site using Windows Basic Authentication.
    1. Those who would register include any 'members only' users where specific content can be 'targeted' to them based on their 'role assignment.'
    2. Another reason to register for the site would be to set up e-Alerts, such as help desk items, announcements, news, or calendar events, etc.

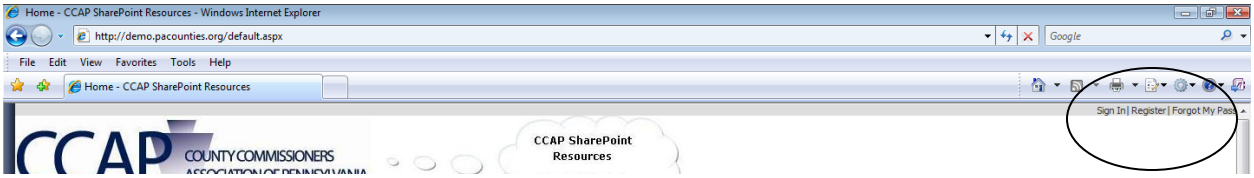
REGISTERED USERS

1. Registration Feature

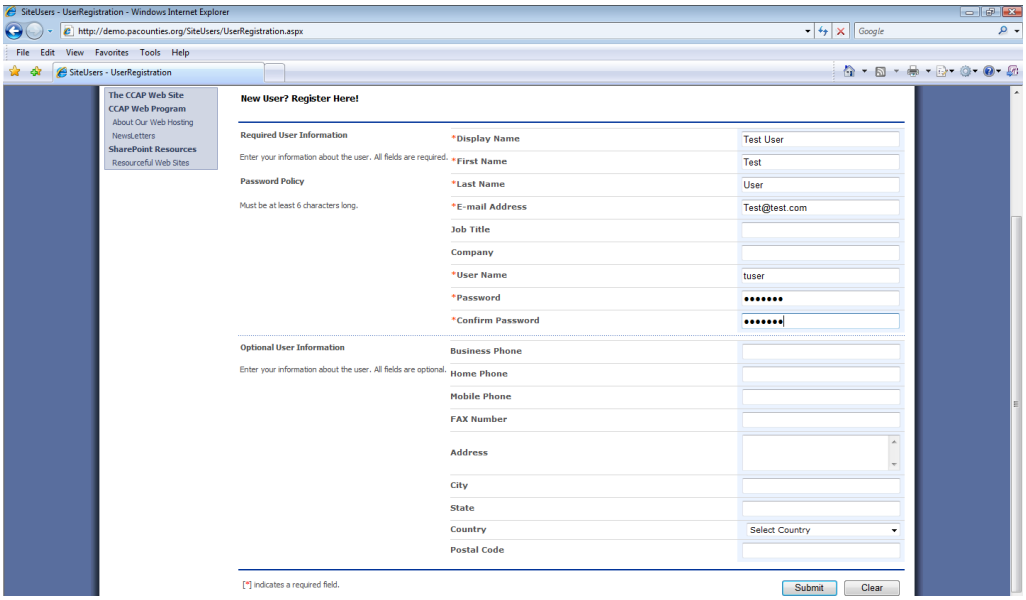
a. *Bamboo User Registration Accelerator* Web Part is used for registration to a site.
b. This Web Part is configured by CCAP IT Staff.
c. This is also located in a more secure location to not allow access to the configuration.
   1. A page would be created for "Site Registration"
   2. This page could hold all items a user would do, such as User Registration, Password Reset and Password Change.
   3. The Site Owner would then put this as a link either in the navigation or some visible location on their home Web page.

2. Registering for the Site

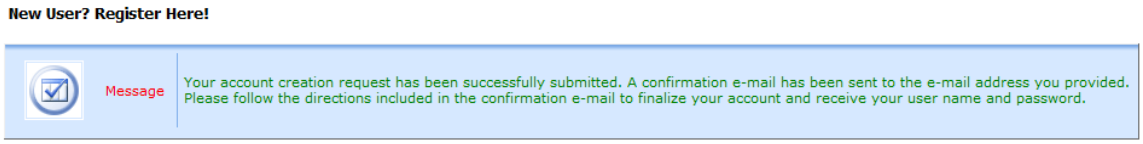
a. They go to the Site Registration page (example below) by clicking on "**Register**."


Home - CCAP SharePoint Resources - Windows Internet Explorer
http://demo.pacounties.org/default.aspx
File Edit View Favorites Tools Help
Home - CCAP SharePoint Resources
Sign In | Register | Forgot My Pass
COUNTY COMMISSIONERS
CCAP SharePoint Resources

b. This opens the User Registration Page (containing the Web part)
c. They fill in all the information (required information is indicated with a *.) Once all information is completed, click "**Submit.**"



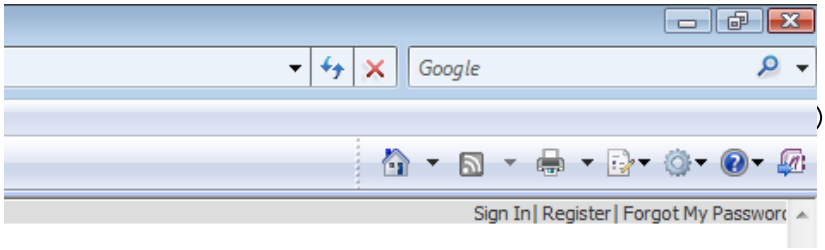
d. This automatically creates an account in AD and SharePoint (however, they do NOT have any 'permissions' in SharePoint other than what an anonymous user is granted.)
e. They receive a confirmation e-mail that their account request has been submitted.


New User? Register Here!
Message
Your account creation request has been successfully submitted. A confirmation e-mail has been sent to the e-mail address you provided.
Please follow the directions included in the confirmation e-mail to finalize your account and receive your user name and password.

f. They will receive the e-mail to the link to "activate" their account.
g. They click on the link which automatically activates their account.
h. They receive a confirmation e-mail with their user name and password.

3. Signing In

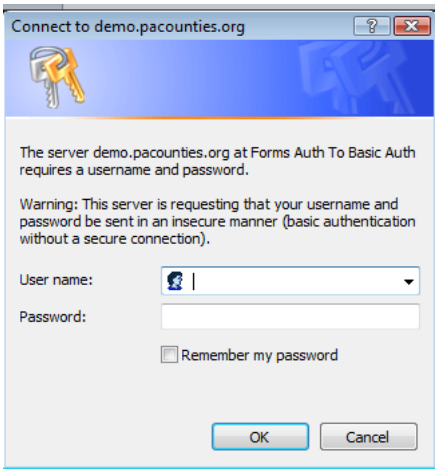
Only those persons who are in the CCAP Web Program Members group are able to access the program members content based on their login to the SharePoint Resource Web site.



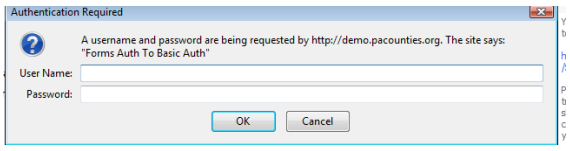
a. To Sign In: a user clicks where it says **Sign In** (upper right hand corner.)

b. When a user clicks here, they will see a "pop up box" which may look slightly different for users based on what browser software they are using.

Example 1: Windows Explorer


Connect to demo.pacounties.org
The server demo.pacounties.org at Forms Auth To Basic Auth requires a username and password.
Warning: This server is requesting that your username and password be sent in an insecure manner (basic authentication without a secure connection).
User name:
Password:
Remember my password
OK
Cancel

Example 2: Mozilla FireFox


Authentication Required
A username and password are being requested by http://demo.pacounties.org. The site says: "Forms Auth To Basic Auth"
User Name:
Password:
OK
Cancel

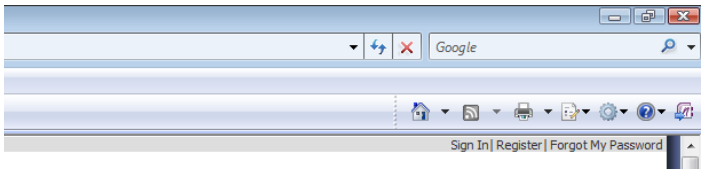
SECTION 4

MANAGING YOUR PASSWORDS

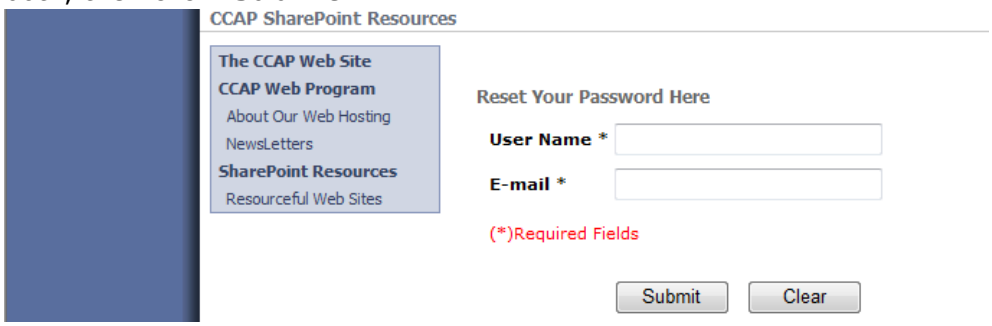
1. Forgot My Password Feature

a. When a registered user forgets their password or needs to reset it for another reason they can by following the below steps.

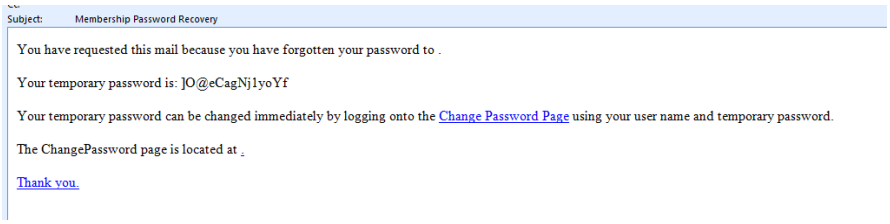
b. On the main page click on "**Forgot My Password**"



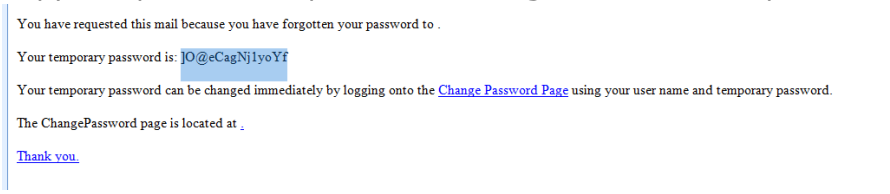
c. Using the user name and e-mail address you *registered on the site with*, enter both, then click "**Submit**"



d. The e-mail will have the new password (these are system generated therefore very cryptic.)

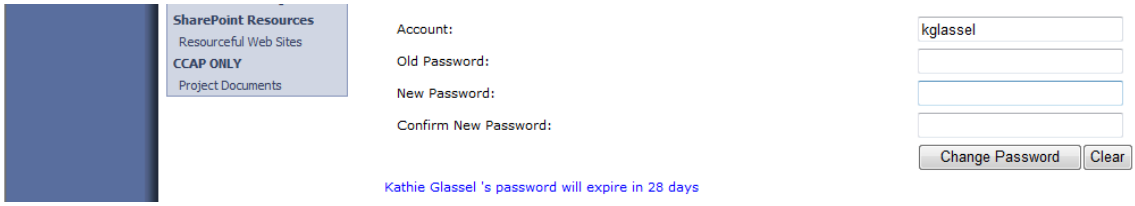

Subject: Membership Password Recovery
You have requested this mail because you have forgotten your password to .
Your temporary password is:]O@eCagNj1yoYf
Your temporary password can be changed immediately by logging onto the Change Password Page using your user name and temporary password.
The ChangePassword page is located at .
Thank you.

e. Copy this password to perform a **Change Password** step below.


You have requested this mail because you have forgotten your password to .
Your temporary password is:]O@eCagNj1yoYf
Your temporary password can be changed immediately by logging onto the Change Password Page using your user name and temporary password.
The ChangePassword page is located at .
Thank you.

2. Change My Password Feature

a. Once some is registered, they can change their Password.
b. The user would login to the site.
c. The user would go to the "Site Registration" page (or whatever page is created for the Change Password Web part.)
d. They would click on Change My Password.



e. It displays their user name.
f. Enter the old password.
g. Enter the new password.
h. Confirm the new password, the click on "Change Password"
i. This displays a confirmation (if done correctly) that the password was changed and shows instructions to log out then back in with new credentials.
j. You may need to shut your browser and log back on.

SECTION 5

AUDIENCE TARGETING

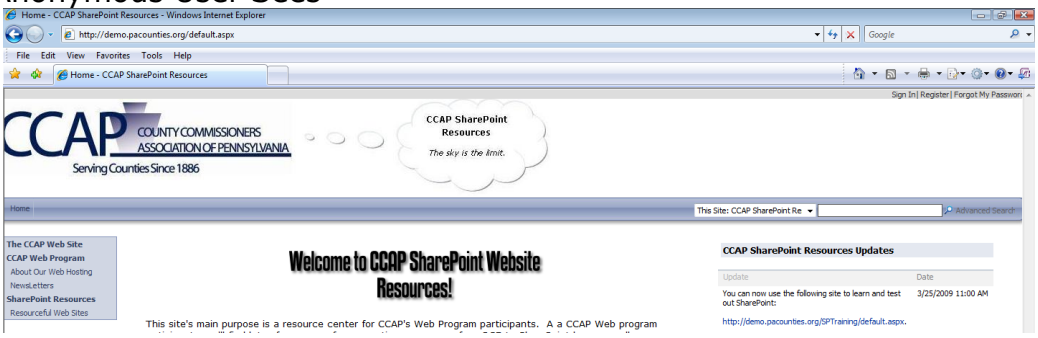
1. Audience Targeting

a. What is it?
   1. By using target audiences, you can display content such as list or library items, navigation links, and entire Web parts to specific groups of people.
   2. A user must be a registered user AND be included into a SharePoint security group.
   3. This is useful when you want to present information that is relevant only to a particular group of people.
   4. Typically assigned by a Site Administrator.

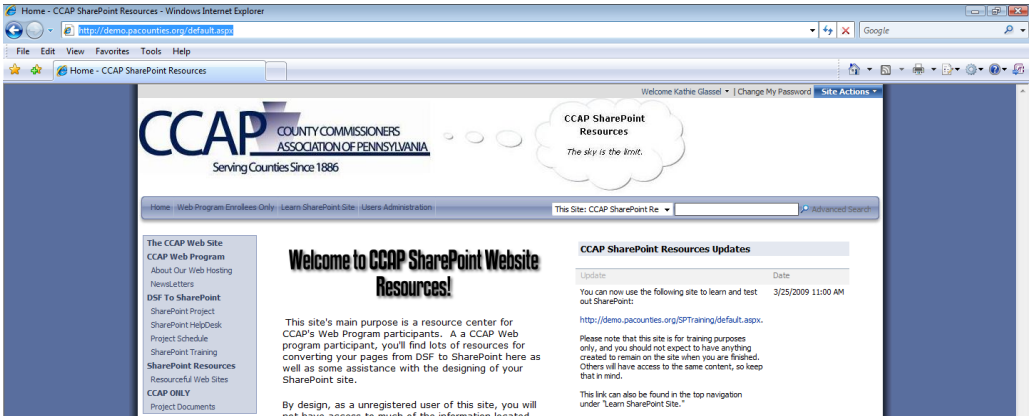
b. Why Use it?
   1. You can have staff see a different tab than your public.
   2. You can have your elected officials see a different tab than public.
   3. It tailors the Web experience according to needs.

2. Examples Of Audience Targeting

a. Anonymous User Sees


Home - CCAP SharePoint Resources - Windows Internet Explorer
http://demo.pacounties.org/default.aspx
CCAP SharePoint Resources
The sky is the limit.
Welcome to CCAP SharePoint Website Resources!
CCAP SharePoint Resources Updates

b. Program Member Sees


Home - CCAP SharePoint Resources - Windows Internet Explorer
CCAP SharePoint Resources
The sky is the limit.
Welcome to CCAP SharePoint Website Resources!
CCAP SharePoint Resources Updates

SECTION 6

STYLES AND CONSISTENCY THROUGH USING CSS

1. CSS (Cascading Style Sheets)

a. By using CSS you can determine what a site can use as far as site color, fonts (such as body of text, titles, etc.)
b. This enables better control of consistency (look and feel) of your site.
c. CCAP has various CSS files, however, there are basic instruction on how your Site Administrator can manage your CSS.
d. If your organization would like to develop their own CSS, that is possible.
e. Once you develop your own CSS, it would be uploaded into the "Styles" library by your Site Administrator.
f. Examples of CSS are available through the Site Administrator.

IMPORTANT: If you are using CSS, you should not copy from DSF or Word. The programs have their own formatting "coding" behind the text that will carry into SharePoint. These formats will make SharePoint ignore any CSS you have established.

2. Applying CSS / Style

a. The Site Administrator would be the only person applying the different CSS files to the site.
b. If you would like to use CSS, please see your Site Administrator.

SECTION 7

WHERE ARE FILES STORED IN SHAREPOINT?

Important Note: There are various places and methods for storing information in SharePoint. These instructions are based on the recommended best practice.

1. Document Libraries

a. A document library where your documents, pages, images or videos would be stored.
b. **Check-in and Check-out:** Similar to a library, a document should be "checked out" if being edited, then "checked back in when done. ***(See Section 8 - Uploading / Loading Files and Images)***
c. It is important to keep the "type of content" (page, images, and documents) in its respective document library.

2. Document Library Best Practice

a. **County Site Storage:** (This would be the top level / main site – generally the county site.)
   1. **Site Collection Documents:** Your documents would be stored in this document library (verses the "documents" document library)
   2. **Site Collection Images:** Your images would be stored here (verses the "images" library)
   3. **Pages:** All the pages for the top level site would be stored here.
b. **Sub Site Storage:** (This would be a department site or member specific site.)
   1. **Documents:** There is a "Documents," "Images" and "Page" library within the hierarchy of your site. You store YOUR documents, images, and pages here. (They can still be accessed – providing rights are given) across any site.
c. **Securing Your Libraries:** Most libraries will inherit the permissions you have on your site. The best practice is to KEEP IT THIS WAY. If you have a need to change security, you may want to think to have a separate site or library created.

3. Lists

a. A list is similar to that of a spreadsheet. If it can be in a spreadsheet, it can be in a list. Some examples of lists include, job posting, RFP posting, contact list, etc.
b. This can ease the necessity of e-mailing items as users of your site can just post or retrieve this information easily themselves. (See "Lists" further in this manual for more details and instructions.)

4. Lists Best Practices

a. Lists will inherit the site permissions they were created within. (So in other words, whatever security you have on your site, the list will have as well.)
b. When you create a list you should think about the purpose of the list.
c. Depending upon the purpose of the list and who should have what type of access, you can "break the inheritance" of the list to make it function as you need.
d. For example: If you want a group to be able to "contribute" but with "approval required" this would warrant a new permission level to be applied against that list.
e. For more information see Lists further in this manual.

SECTION 8

MANAGE CONTENT AND STRUCTURE

1. How To Access Your Document Libraries and Lists

There are two different ways to access your information. Each way is described below.

Option 1: Manage Content and Structure

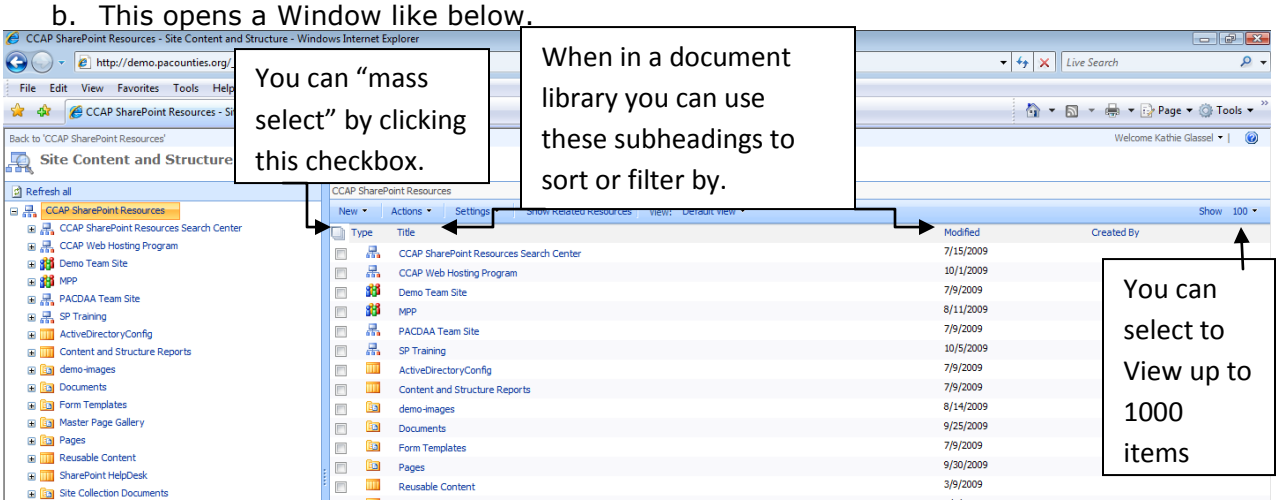
a. Your first view in looking at your data is through a *Windows Explorer* like view.
b. This view shows you the **ENTIRE structure of your Web site (the hierarchy)**.
c. You will only have rights to the information based on what your Administrator has set up for you.
d. Under this view you can:
   1. Open up different sites in a site collection (to include the site or the site settings.)
   2. Open up document libraries, to include going to their settings.
      (1) You may do "mass selection" to either publish, check-in or delete documents, images and pages (provided you have the rights to do so.)
      (2) You may copy or move documents, images and pages.
      (3) Based on content type you may create items from this Window as well.

Option 2: View All Site Content

a. This is more like a "folder view" of your content only.
b. You can create various content areas (document libraries, lists, discussion boards, etc.) through this Window.
c. You can access each content area
d. You can also view metadata (see Metadata further in this manual for more information).
e. You can do almost all the functions you can do in the Manage Content and Structure (*explorer view).*

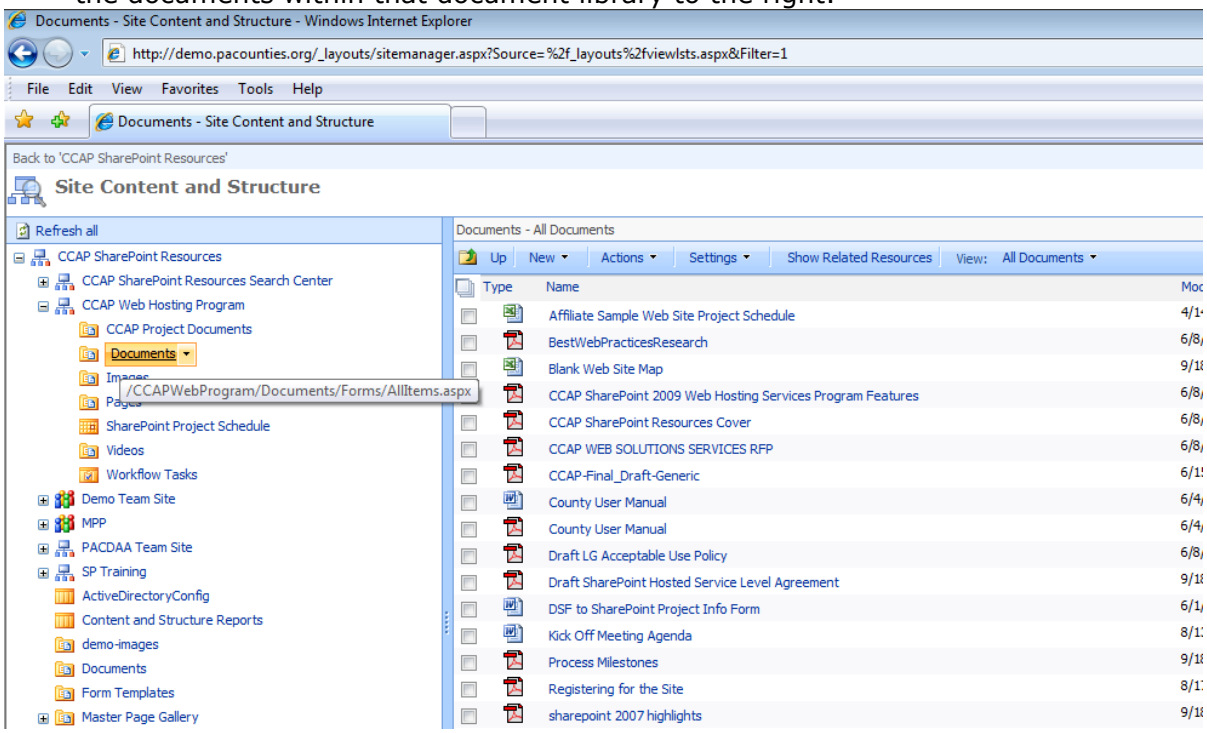
2. Option 1: Manage Content and Structure

a. Click on **Site Actions -> Manage Content and Structure**
b. This opens a Window like below.

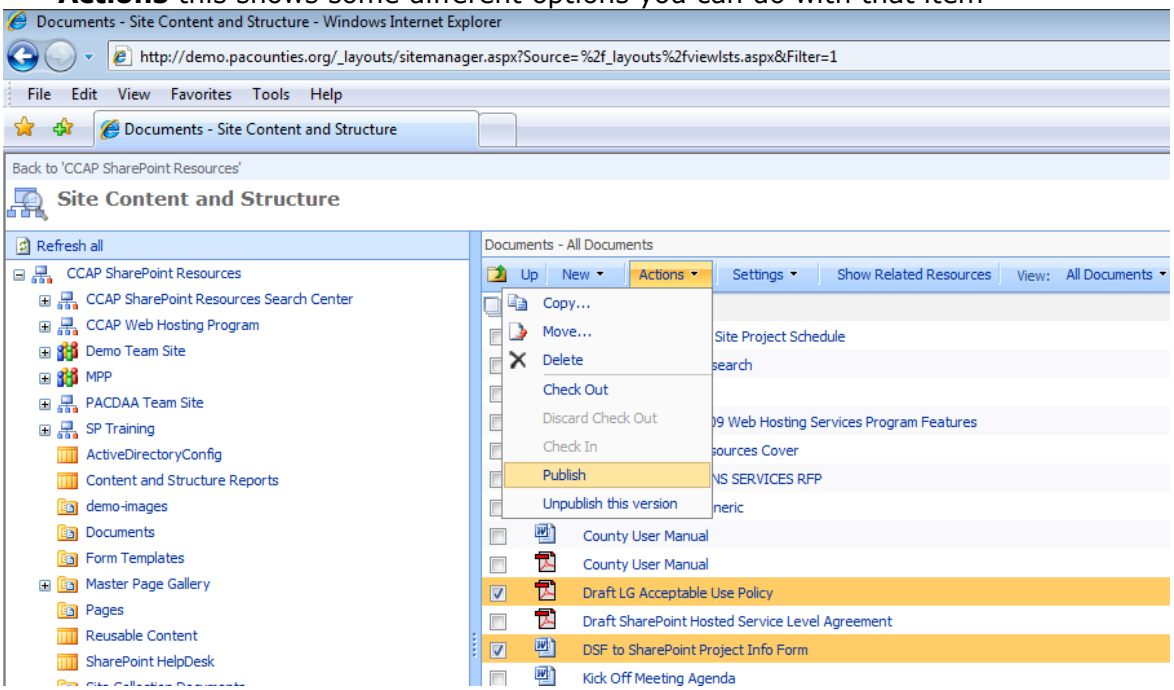

You can "mass select" by clicking this checkbox.
When in a document library you can use these subheadings to sort or filter by.
You can select to View up to 1000 items

c. You click on the **+** to expand the view of the desired item.

d. The below example shows a Subsites Documents Library to the left (highlighted) and the documents within that document library to the right.



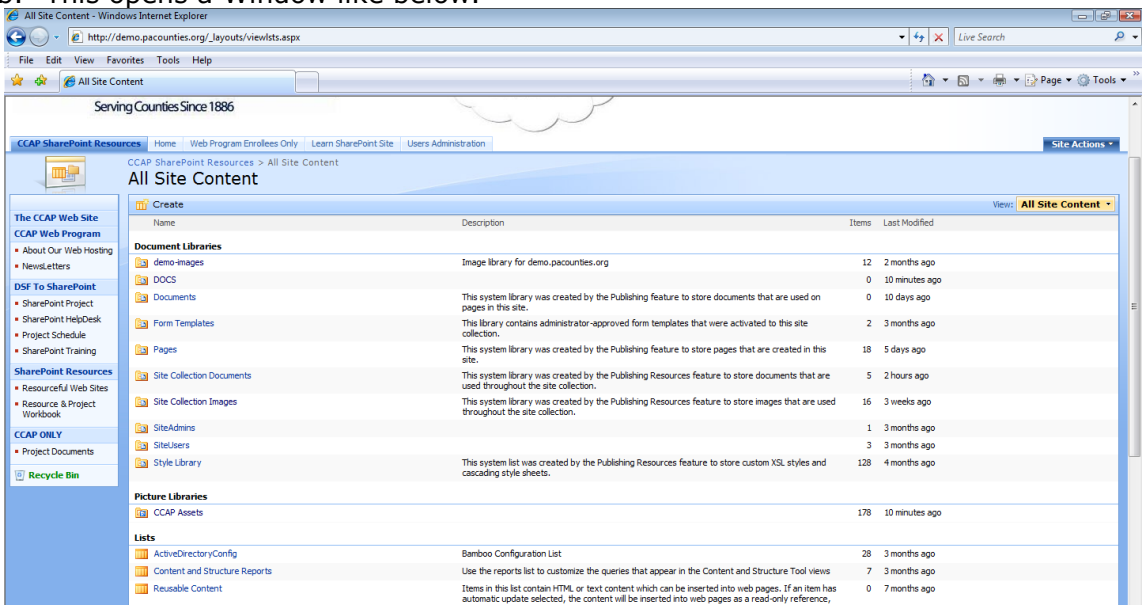
e. If you place a check in the box next to the item (image, document, page)and click on **Actions** this shows some different options you can do with that item



f. You can select multiple items and publish or check in all at once!

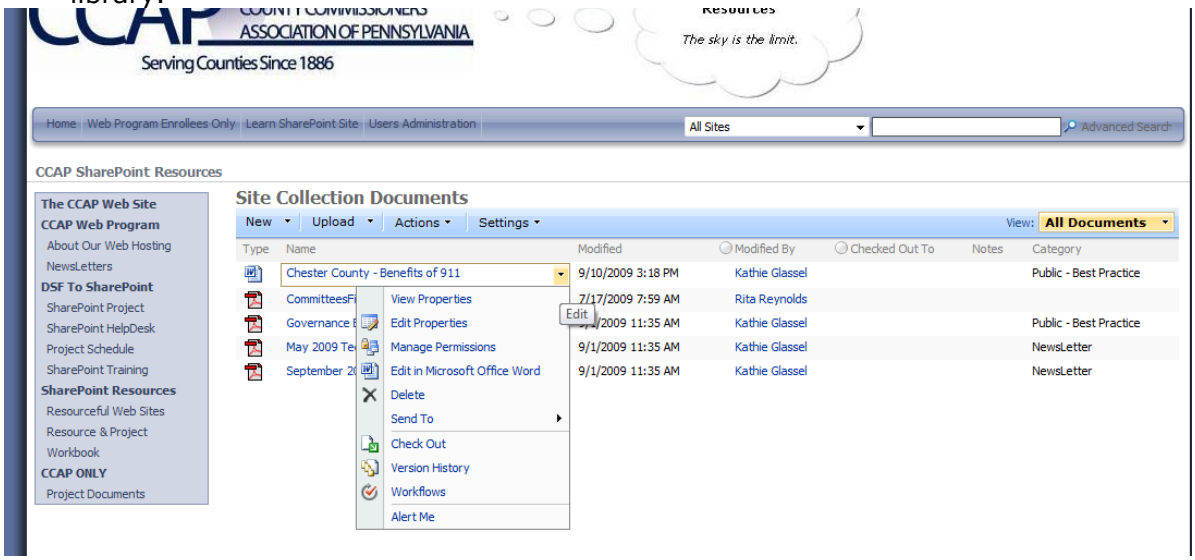
3. Option 2: View All Site Content

a. Click on **Site Actions -> View All Site Content**
b. This opens a Window like below.



c. By clicking on the items you can open and access (and create new) your:
   1. Document Libraries
   2. Lists
   3. Picture Libraries
   4. Discussion Boards
   5. Surveys

d. The Window below shows the view of the Site Collection Documents document library.



e. By clicking directly beside the file you access a drop down menu with options of what you can do with that item.

For more information on creating new Libraries, Lists, Discussion Boards or Surveys see the separate instructions later in this manual!

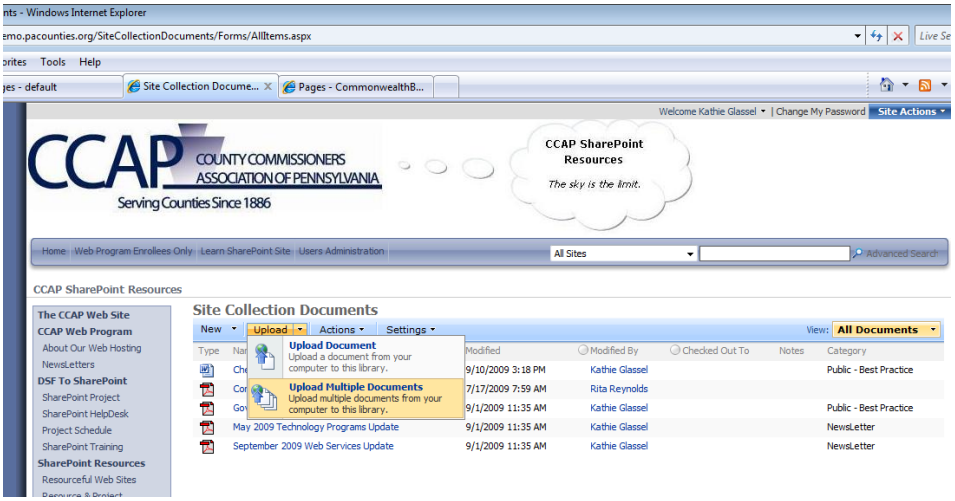
UPLOADING FILES

Important Note: It is very important that you upload your files to the proper directory. For example, a department specific file should be uploaded in the **Documents** section of the department sub-site. In general, all files for public viewing will be uploaded to the main **Site Collection Documents** or **Site Collection Images** libraries.

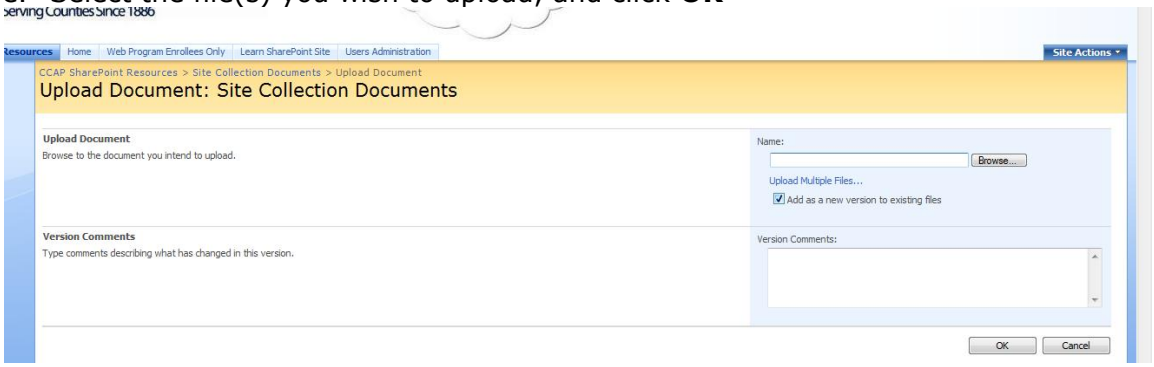
These instructions are using the "View All Site Content" however these would be similar to that of the "Manage Content and Structure" upload as well.

1. Uploading via "View All Site Content"

a. While logged in, click **Site Actions > View all Site Content**
b. Click on the Document Library you wish to upload to
c. For uploading a single file, simply click **Upload**
d. For multiple files, click the arrow to the right of the **Upload** button and click '**Upload Multiple Documents**'



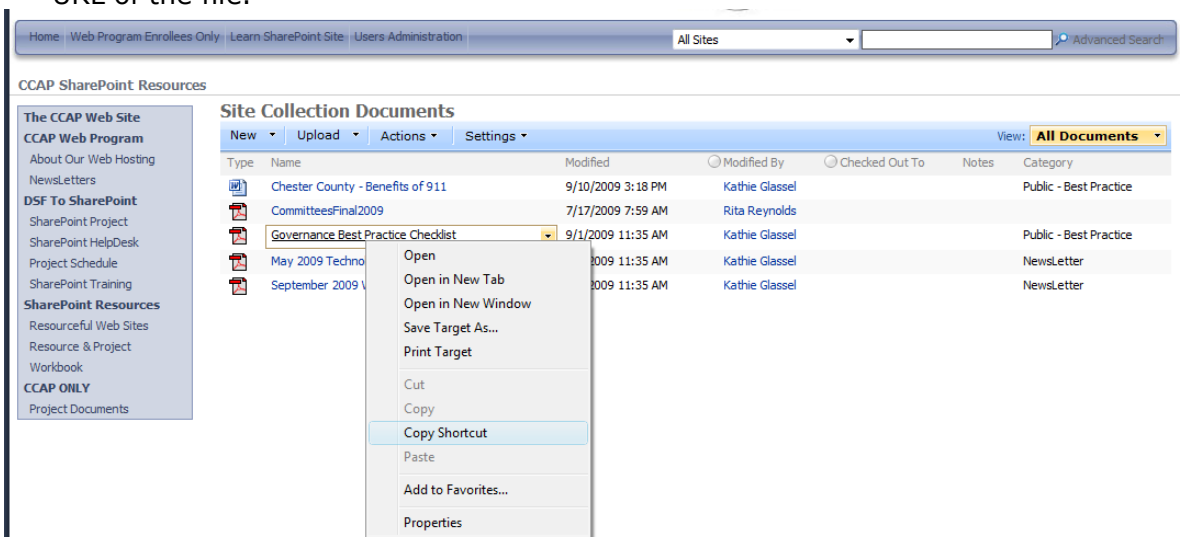
e. Select the file(s) you wish to upload, and click **OK**



f. If prompted, enter in the descriptive information for the file, and press **Check In**
g. You may need to "Publish" the files for available use to the public.

2. Copying the Link Of Your Uploaded File

a. While logged in, click **Site Actions > View all Site Content**
b. Open the document library (documents or images, etc.) where you want to get the URL of the file.

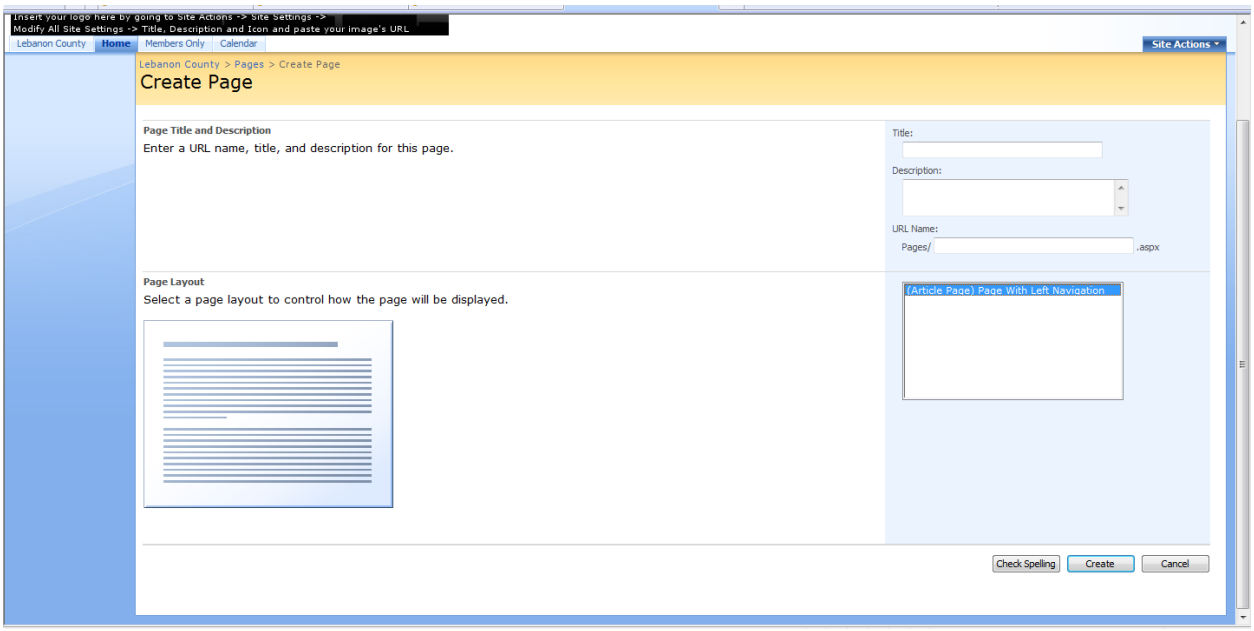


c. Find the File
d. Right Click on the File Name
e. Select "**Copy Shortcut**"
f. You can then paste this as a URL Link in a Summary Links or a hyperlink.

CREATING PAGES

1. Creating A New Page

a. Login to the Site
b. Click on "**Site Actions**"
c. Click on "**Create Page**"
d. Give it a descriptive Title. Avoid the use of the word "menu"
e. This will automatically name the page based on the entered Title
f. Select "**Article Page (Page With Left Navigation)**"
g. Press "**Create**"


Insert your logo here by going to Site Actions -> Site Settings ->
Modify All Site Settings -> Title, Description and Icon and paste your image's URL
Lebanon County
Home
Members Only
Calendar
Site Actions
Lebanon County > Pages > Create Page
Create Page
Page Title and Description
Enter a URL name, title, and description for this page.
Title:
Description:
URL Name:
Pages/
.aspx
Page Layout
Select a page layout to control how the page will be displayed.
(Article Page) Page With Left Navigation
Check Spelling
Create
Cancel

DESIGNING & EDITING PAGES

1. Designing a Page

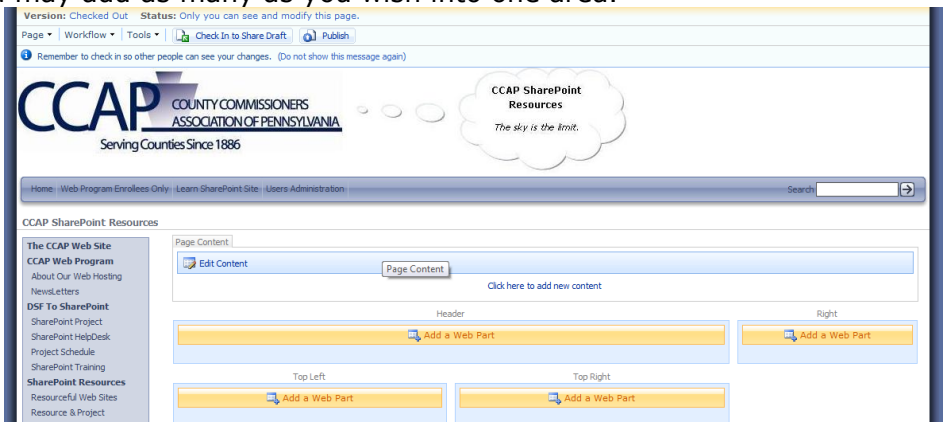
a. You will want to give your Page a Title. (If you are using CSS this can help keep consistency that your Title on your pages will ALWAYS be the same font, color, and font size!)
b. You will have several "Content Place Holders" available for you to use in designing your page.
c. These place holders will consist of content (text), images, links, or lists.
d. You may copy and paste from DSF, Word or Notepad, **however, keep in mind, if you are using "Styles" (see Styles and Consistency Through CSS) then you may want to consider using Notepad, then formatting within the SharePoint Content Editor.**

2. Web Parts

a. **What Are They And When To Use Which Ones?**
   1. A Web part controls how the content will be placed on your page.
   2. There are many available to you "out of the box" and there are many also available on the Internet.
   3. The most common ones that you will use are:
      (1) Content Editor Web Part: Use to add text anywhere you can "Add a Web part"
      (2) Summary Links Web Part: Use to add links (either to internal pages, documents or external sites)
      (3) Image Web Part: Use to display images (or you can place images directly in the Content Editor Web Part.
      (4) Lists: Use to display libraries. You can use various views (See Lists later in this manual **for ALL instructions relating to lists**) to control what the end user sees on your site.

There are many others available; however, this manual is only going to focus on the most commonly used.

b. **Adding A Web Part**
   1. On a page you will see various sections that state "Add a Web Part"
   2. You may add as many as you wish into one area.



3. You may also move these once you add them onto a page to another location on the page.
4. Select which area you would like to add the Web part
5. Click on "**Add Web Part**"
6. This will open a new Windows that lists out all the Web parts (as mentioned there are many here and you probably will not use most of them to start with.)

c. **Modifying A Web Part**

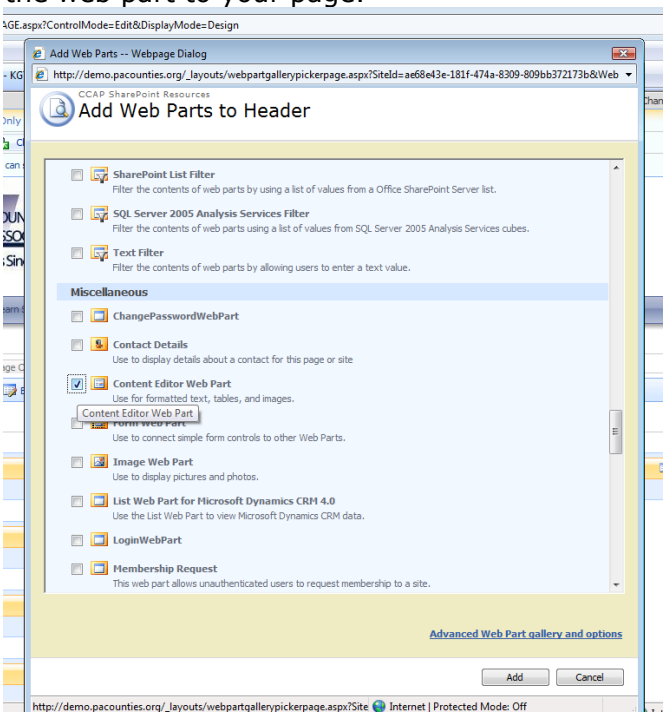
1. When you add a Web part (any Web part) you will more than likely want to modify its "properties".
2. Properties include: Title, border, and maybe some other items depending on the Web part itself.

The most common modifications will be listed here, although you can play with the settings to see the affects of the changes you make!

3. The Content Editor Web Part

a. **Adding the Web Part**

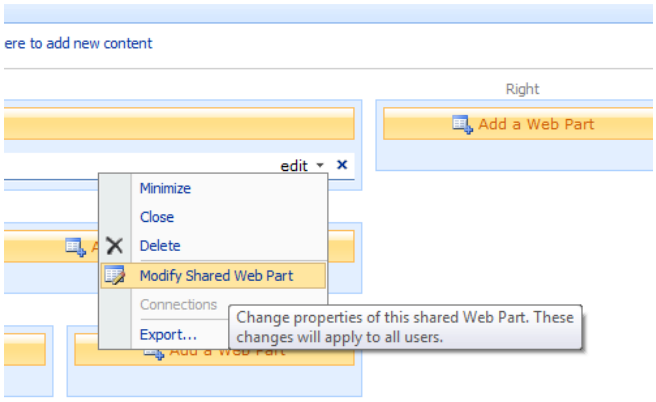
1. This is located under the section called **Miscellaneous**
2. Select the "**Content Editor Web Part**" by clicking in the box
3. Click "**Add**"
4. This will add the web part to your page.


Add Web Parts -- Webpage Dialog
http://demo.pacounties.org/_layouts/webpartgallerypickerpage.aspx?SiteId=ae68e43e-181f-474a-8309-809bb372173b&Web
CCAP SharePoint Resources
Add Web Parts to Header
SharePoint List Filter
Filter the contents of web parts by using a list of values from a Office SharePoint Server list.
SQL Server 2005 Analysis Services Filter
Filter the contents of web parts using a list of values from SQL Server 2005 Analysis Services cubes.
Text Filter
Filter the contents of web parts by allowing users to enter a text value.
Miscellaneous
ChangePasswordWebPart
Contact Details
Use to display details about a contact for this page or site
Content Editor Web Part
Use for formatted text, tables, and images.
Content Editor Web Part
Use to connect simple form controls to other Web Parts.
Image Web Part
Use to display pictures and photos.
List Web Part for Microsoft Dynamics CRM 4.0
Use the List Web Part to view Microsoft Dynamics CRM data.
LoginWebPart
Membership Request
This web part allows unauthenticated users to request membership to a site.
Advanced Web Part gallery and options
Add
Cancel
Internet | Protected Mode: Off

b. **Modifying The Content Editor Web Part**

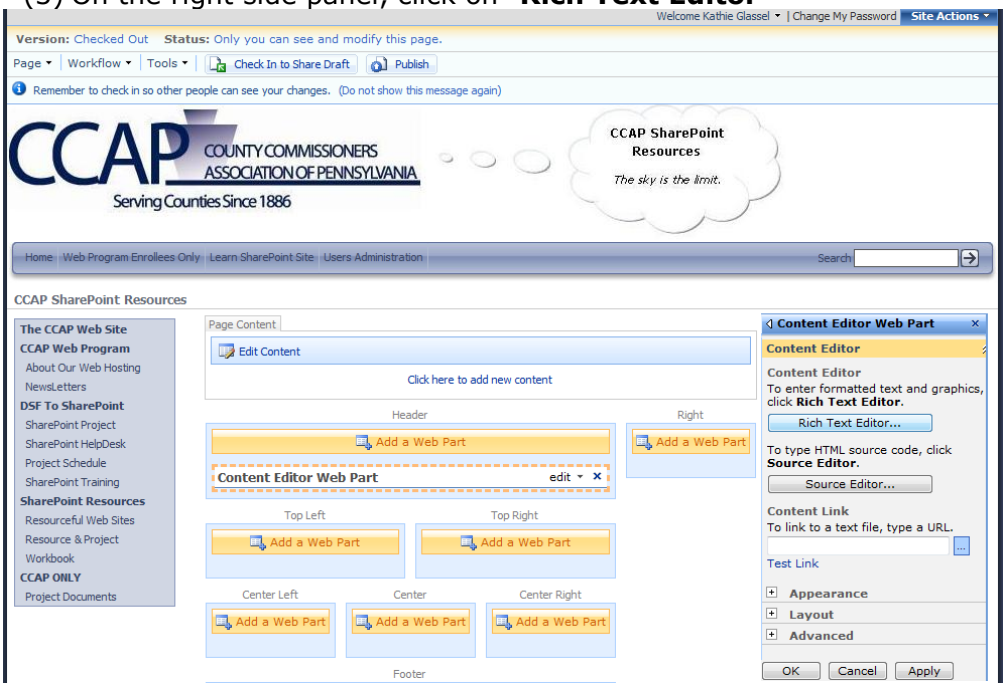
1. **Adding Text:**

(1) Click "**Edit**" beside the web part you just added, select **"Modify Shared Web Part"**



(2) This opens a panel to the right on your screen where you make all your modifications.

(3) On the right side panel, click on "**Rich Text Editor**"



(4) This brings up the "**Content Editor"**

(5) You may enter text or format into a bulleted list and add pictures

(6) You may add "Hyperlinks" to other sites, e-mail addresses, and pages. To do this you:

(a) Highlight the text that you want linked to a content page.

(b) Press the "**Hyperlink**" button (globe)

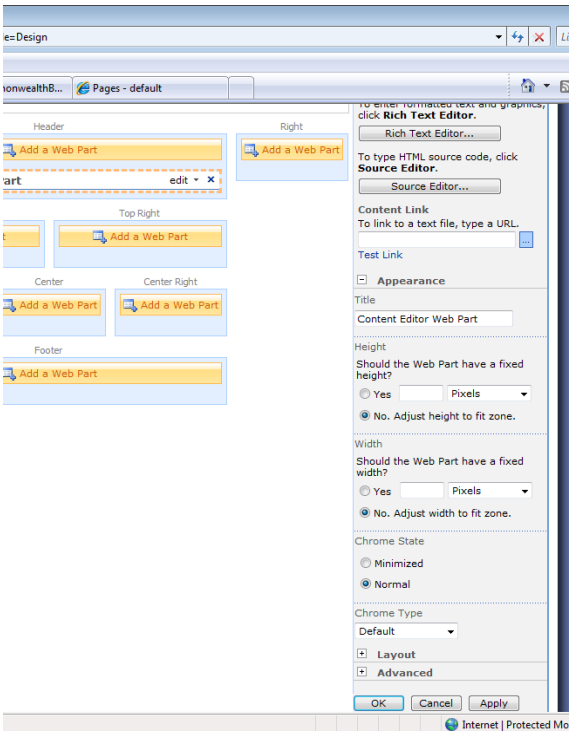
(c) Go to "**Current Site Pages**" and select the page you want this to link to and press "**OK**".

(d) You may also add a contact e-mail link: you must type in "**mailto:"** prior to the e-mail address for the link. (If you really want to get fancy you can have the subject already input into the message by typing:

mailto:someone@yoursite.com?subject=Mail from Our Site

2. **Modifying the appearance, layout of Content Editor Web Part**

(1) If you are not just adding the Web part, you click on the **edit** (right corner of Web part), then select **"Modify Shared Web Part".**



(2) On the right side, expand "**Appearance**" Change the title from "**Content Editor Web Part**" to the name. Avoid the use of the word "menu"

(3) Under Chrome Type select your preference (you would either chose to show the **Title Only** or **None** in most cases.)

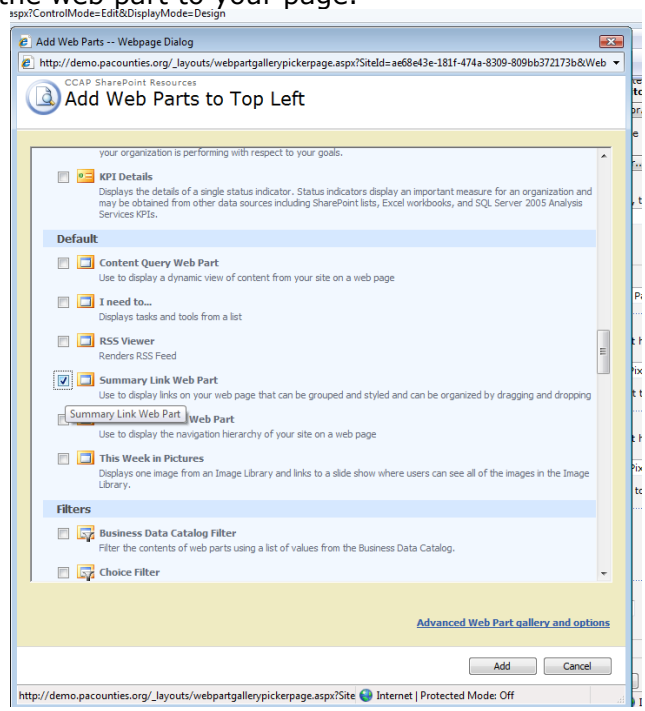
IMPORTANT NOTE: If you do not change the "Chrome Type" your page will have "Content Editor Web Part" displayed on the page where you added this Web part AND a thin lined border will be around it. (This is a default setting.)

(4) Click "**OK**"

4. The Summary Link Web Part

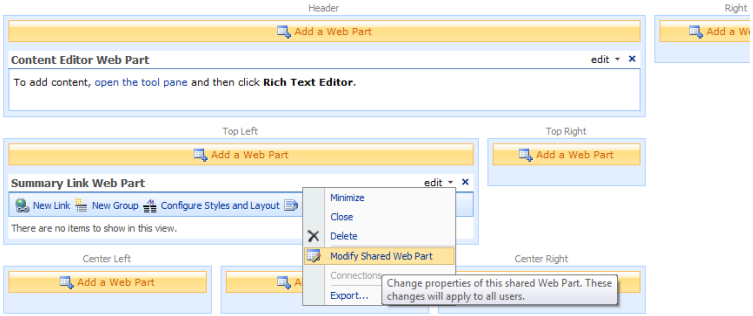
a. Adding the Web Part

1. This is located under the section called **Default**
2. Select the "**Summary Link Web Part**" by clicking in the box
3. Click "**Add**"
4. This will add the web part to your page.

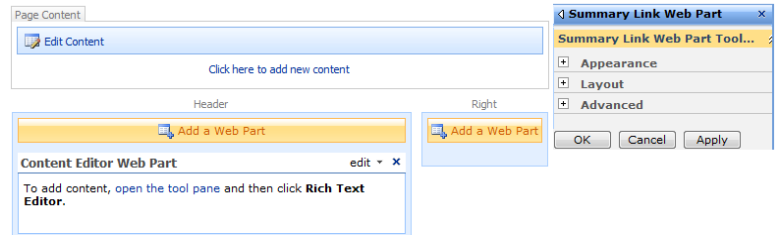


b. Modifying The Summary Link Web Part

1. Click "**Edit**" beside the web part you just added, select **"Modify Shared Web Part"**



2. This opens a panel to the right on your screen where you make all your modifications.
3. On the right side panel, click on the **+** beside "**Appearance**"



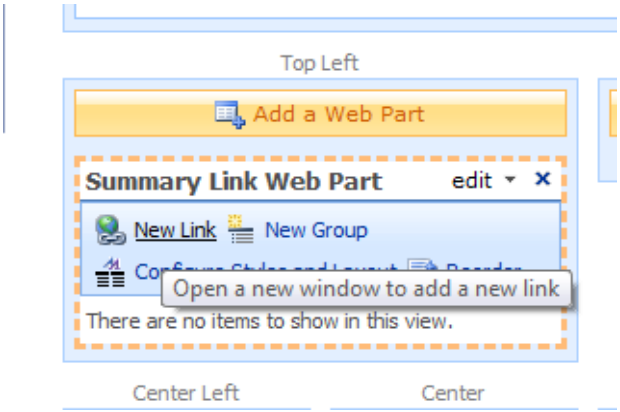
4. Change the title from "**Summary Link Web Part**" to the name of Choice (or you can leave it if you plan on selecting Chrome type as None.)
5. Avoid the use of the word "menu"
6. Under Chrome Type select your preference (you would either chose to show the **Title Only** or **None** in most cases.)

   IMPORTANT NOTE: If you do not change the "Chrome Type" your page will have "Content Editor Web Part" displayed on the page where you added this Web part AND a thin lined border will be around it. (This is a default setting.)

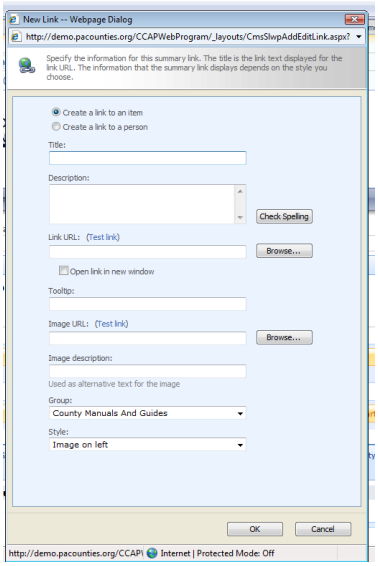
7. Click "**OK**"

c. **Adding Links To The Summary Link Web Part**

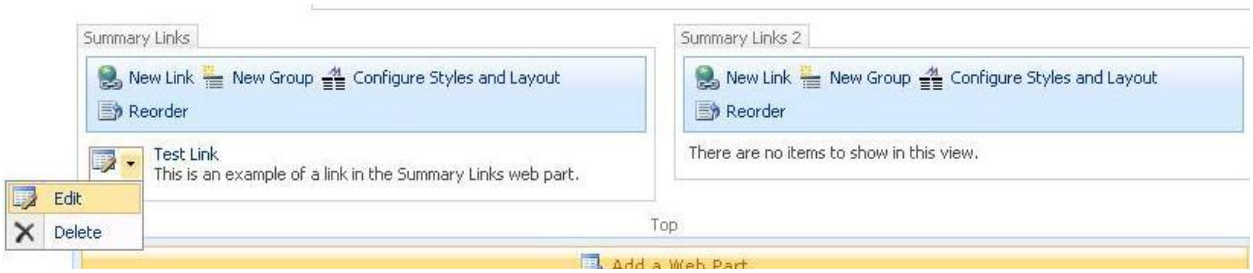
1. Click on New Link



2. In the New Link dialog box, type a name for the link
3. Browse for or manually type in the address (url) of the desired page in the **Link URL** box
4. It is also good practice to type in a Description (which you have the option of displaying) and a Tooltip (alternate text).
5. Click **OK**



6. If you wish to group your links, simply click the **New Group** button
7. Type in a name for your group
8. To add a link to a particular group:
9. Edit the link by clicking the dropdown arrow next to the desired link, and selecting '**Edit**'



10. In the Edit Link dialog box, find the '**Group**' dropdown menu, and find the group of which you wish to add your link to
11. Click **OK**

d. **Managing The Style And Order Of Summary Links**

1. To change the style:
   (1) Click '**Configure Styles and Layout**' in the Summary Links section
   (2) You will most likely want all of your links to be displayed the same on each page, so be sure to select the **Default Style for New Links** to your desired style
   (3) If you have already created links which are not conformed to the default style you want, click the checkbox for '**Change existing links to use this style**' and select the same style you've chosen for the Default Style
   (4) If you wish, you can also choose a style for your link Group headings as well in this same dialog window
   (5) The '**Number of columns**' can also be changed to have more columns of links
   (6) Click OK when done configuring your styles

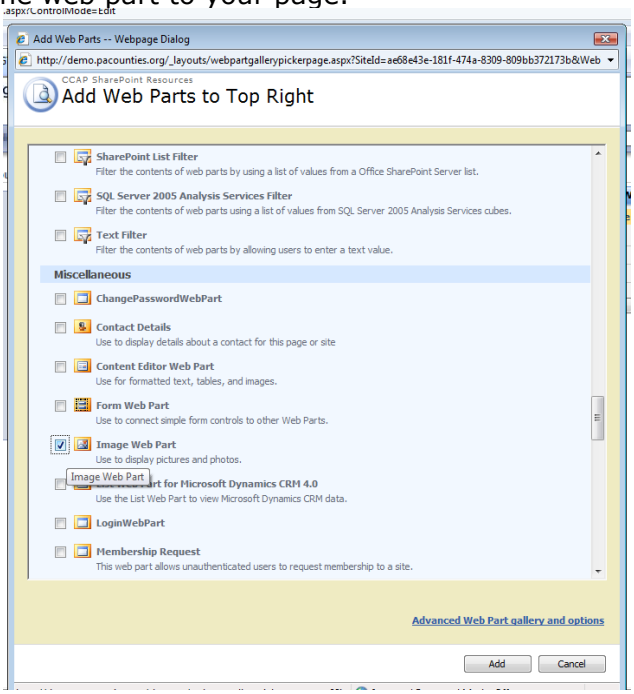
e. **To change the order of your links:**

   (1) Simply click '**Reorder**' in the Summary Links section
   (2) Click on the link you wish to move, and use the **Move Up** and **Move Down** buttons to move links to your desired position

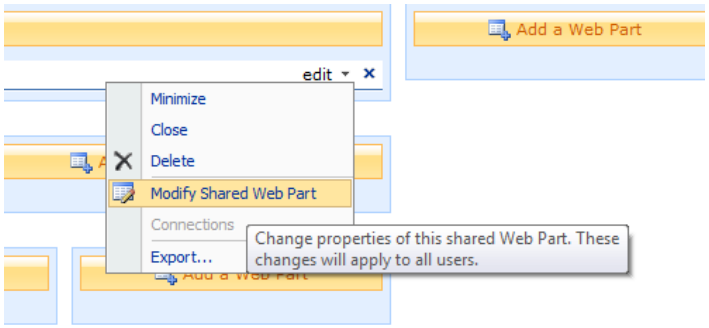
   Note: you can also change each link's Group by using the Reorder feature as well, as opposed to editing each link individually

5. The Image Web Part

a. **Adding the Web Part**
   1. This is located under the section called **Miscellaneous**
   2. Select the "**Image Web Part**" by clicking in the box
   3. Click "**Add**"
   4. This will add the web part to your page.

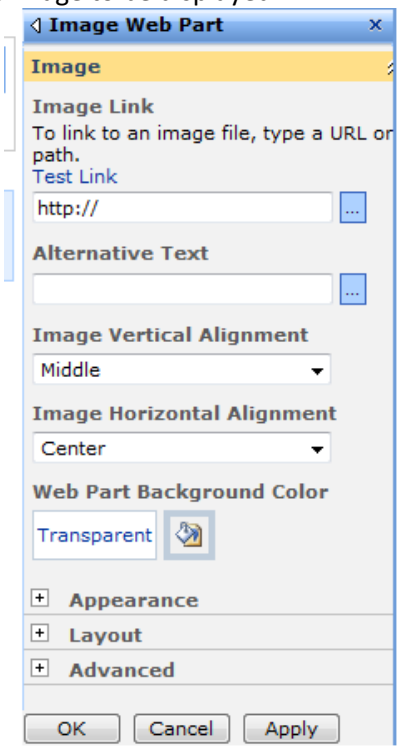

Add Web Parts -- Webpage Dialog
http://demo.pacounties.org/_layouts/webpartgallerypickerpage.aspx?SiteId=ae68e43e-181f-474a-8309-809bb372173b&Web
CCAP SharePoint Resources
Add Web Parts to Top Right
SharePoint List Filter
Filter the contents of web parts by using a list of values from a Office SharePoint Server list.
SQL Server 2005 Analysis Services Filter
Filter the contents of web parts using a list of values from SQL Server 2005 Analysis Services cubes.
Text Filter
Filter the contents of web parts by allowing users to enter a text value.
Miscellaneous
ChangePasswordWebPart
Contact Details
Use to display details about a contact for this page or site
Content Editor Web Part
Use for formatted text, tables, and images.
Form Web Part
Use to connect simple form controls to other Web Parts.
Image Web Part
Use to display pictures and photos.
Image Web Part
Use the List Web Part to view Microsoft Dynamics CRM data.
LoginWebPart
Membership Request
This web part allows unauthenticated users to request membership to a site.
Advanced Web Part gallery and options
Add
Cancel

b. **Modifying The Image Web Part**
   1. **Adding The Image:**
      (1) Click "**Edit**" beside the web part you just added, select **"Modify Shared Web Part"**



      (2) This opens a panel to the right on your screen where you make all your modifications.

(3) **You MUST know the EXACT LOCATION of your image in order to have your image appear.**
(a) To do this you would need to upload your image first!!
(b) Once you have the image uploaded, you can get the URL by: Right Clicking on the File and select "**Copy Shortcut**" (see uploading Files for more instructions.)
(c) On the right side panel, where it says "**Image Link**" You paste the URL here in order for the image to be displayed.



(4) Enter the Alternative Text for Your Image (Best Practice)

2. **Modifying the appearance, layout of Image Web Part**
(1) If you are not just adding the Web part, you click on the **edit** (right corner of Web part), then select **"Modify Shared Web Part".**
(2) On the right side, expand "**Appearance**"
(3) Change the "Chrome Type" select your preference (you would either chose to show the **Title Only** or **None** in most cases.)

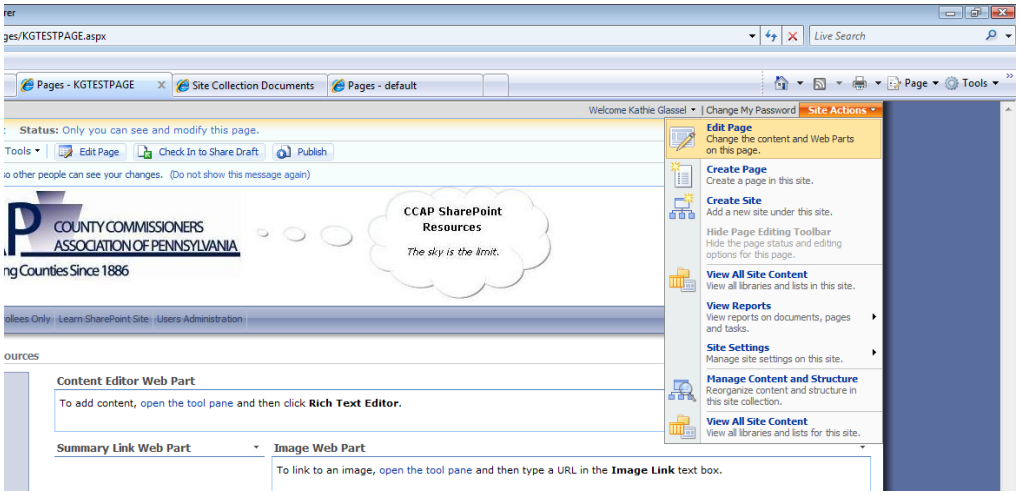
IMPORTANT NOTE: If you do not change the "Chrome Type" your page will have "Content Editor Web Part" displayed on the page where you added this Web part AND a thin lined border will be around it. (This is a default setting.)

(4) Click "**OK**"

6. Editing A Page

a. Login to the Site
b. Go to the page you want to edit
c. Click on "**Site Actions**"
d. Click on "**Edit Page**"

NOTE: IF you have the Page Editing Toolbar displayed, you may also just click "**Edit Page**"

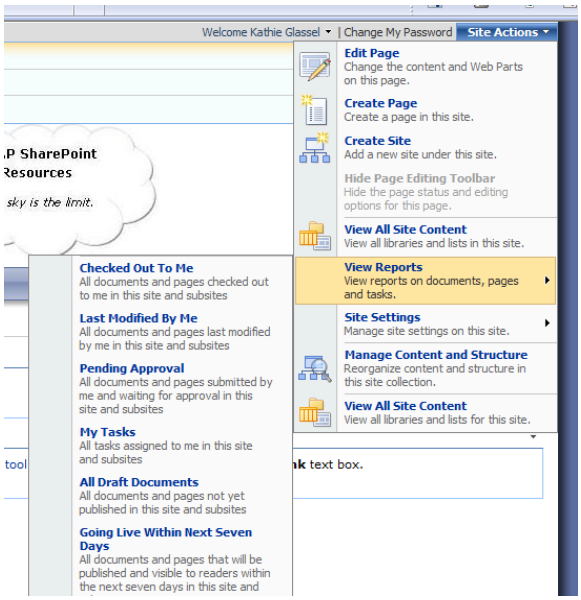

Pages - KGTESTPAGE
Site Collection Documents
Pages - default
Welcome Kathie Glassel
Change My Password
Site Actions
Status: Only you can see and modify this page.
Edit Page
Check In to Share Draft
Publish
Edit Page
Change the content and Web Parts on this page.
Create Page
Create a page in this site.
Create Site
Add a new site under this site.
Hide Page Editing Toolbar
Hide the page status and editing options for this page.
View All Site Content
View all libraries and lists in this site.
View Reports
View reports on documents, pages and tasks.
Site Settings
Manage site settings on this site.
Manage Content and Structure
Reorganize content and structure in this site collection.
View All Site Content
View all libraries and lists for this site.
COUNTY COMMISSIONERS ASSOCIATION OF PENNSYLVANIA
CCAP SharePoint Resources
The sky is the limit.
Content Editor Web Part
To add content, open the tool pane and then click Rich Text Editor.
Summary Link Web Part
Image Web Part
To link to an image, open the tool pane and then type a URL in the Image Link text box.

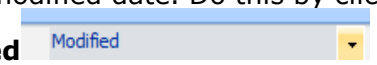
e. For Editing Content in the (text, images, or summary links) follow the instructions for modifying the Web Part.
   1. Content Editor
   2. Summary Links
   3. Images

SECTION 12

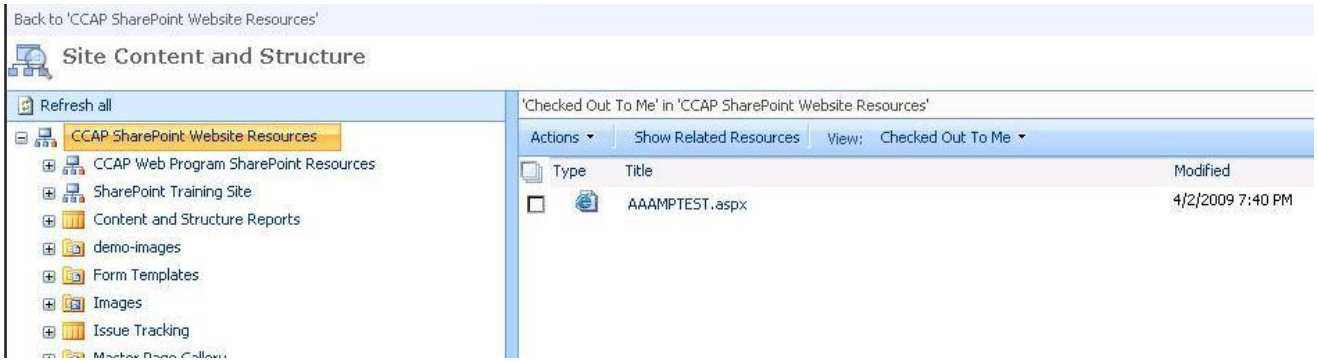
FINDING FILES/PAGES LAST MODIFIED BY YOU

1. If you forgot which page/file you were last working on, there is a very easy way to find these by using Reports
2. Log into pacounties.org
3. From **'Site Actions'** '**View Reports'**


Welcome Kathie Glassel
Change My Password
Site Actions
Edit Page
Change the content and Web Parts on this page.
Create Page
Create a page in this site.
Create Site
Add a new site under this site.
Hide Page Editing Toolbar
Hide the page status and editing options for this page.
View All Site Content
View all libraries and lists in this site.
View Reports
View reports on documents, pages and tasks.
Site Settings
Manage site settings on this site.
Manage Content and Structure
Reorganize content and structure in this site collection.
View All Site Content
View all libraries and lists for this site.
Checked Out To Me
All documents and pages checked out to me in this site and subsites
Last Modified By Me
All documents and pages last modified by me in this site and subsites
Pending Approval
All documents and pages submitted by me and waiting for approval in this site and subsites
My Tasks
All tasks assigned to me in this site and subsites
All Draft Documents
All documents and pages not yet published in this site and subsites
Going Live Within Next Seven Days
All documents and pages that will be published and visible to readers within the next seven days in this site and

4. Select the report you wish to view. Most common reports will be '**Checked Out To Me**' and '**Last Modified By Me**'
5. The reports will come up in the '**Manage Site Content And Structure**' window
6. To view the most recent modification, it may be easier to arrange the items by the most recent modified date. Do this by clicking the arrow to the right of the **Modified** 

column, and selecting a sort option



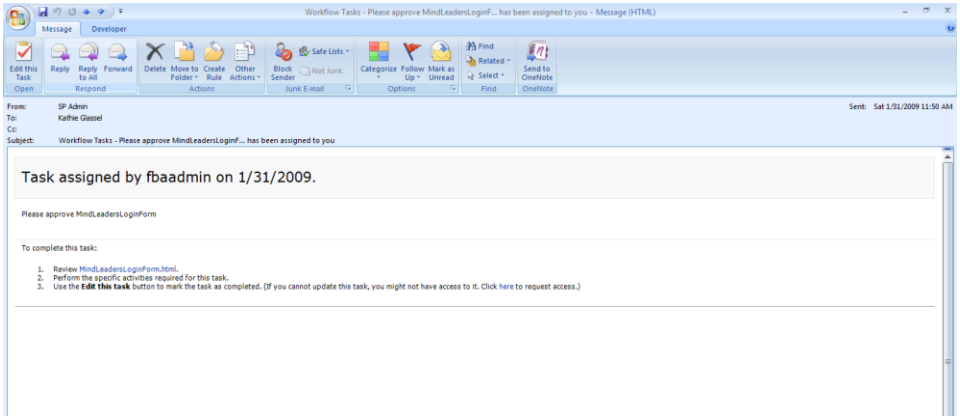
You can choose to sort Ascending, Descending, or by a particular date on which you have made the last modification.

APPROVING A PAGE

The Instruction below is ONLY if you have the approval process in place.

1. How Do I Know I Have To Approve An Item?

a. Once a user creates, updates, changes, etc. a page or even a list, they would submit it for approval.
b. The designated approver should receive an e-mail stating there are pages or a new item that need to be approved.


Workflow Tasks - Please approve MindLeadersLoginF... has been assigned to you - Message (HTML)
Message
Developer
From: SP Admin
To: Kathie Glassel
Cc:
Subject: Workflow Tasks - Please approve MindLeadersLoginF... has been assigned to you
Sent: Sat 1/31/2009 11:50 AM
Task assigned by fbaadmin on 1/31/2009.
Please approve MindLeadersLoginForm
To complete this task:
1. Review MindLeadersLoginForm.html.
2. Perform the specific activities required for this task.
3. Use the Edit this task button to mark the task as completed. (If you cannot update this task, you might not have access to it. Click here to request access.)

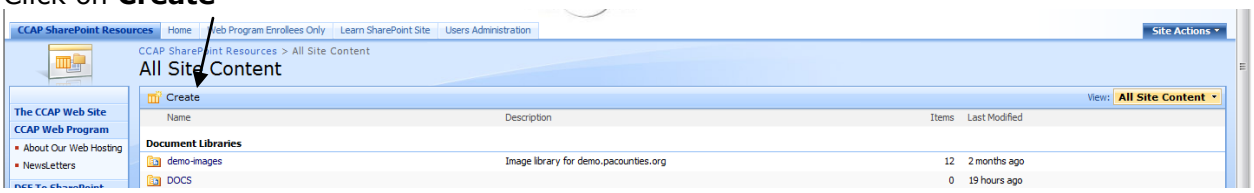
c. This e-mail will include the link.
d. Once you click the link you will go to the page that needs approved.
e. You will need to be logged in to the site to approve the page.

CREATING LISTS & CALENDARS

1. Creating A List

A list and a calendar are very similar. The main difference is the views that are available for display.

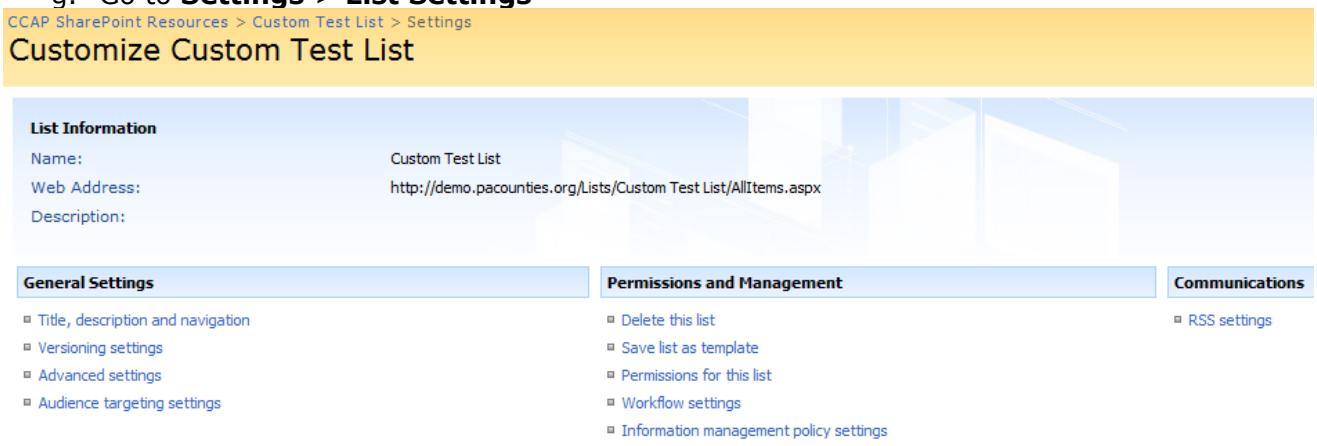
a. When logged in, select **Site Actions** > **View All Site Content**
b. Click on **Create**



c. Select **Custom List** from the Custom List column (or the type of item you want to create)

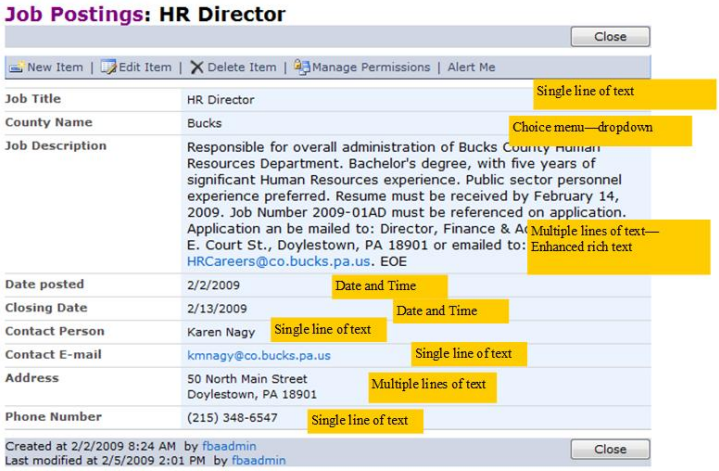
Create
Custom List
Create a custom list when you want to specify your own columns. The list opens as a Web page and lets you add or edit items one at a time.
Libraries
Document Library
Communications
Announcements
Tracking
Links
Custom Lists
Custom List

d. Type a name and description for your list
e. Be sure to select **No** for **Display this list on the Quick Launch?**
f. You then want to set up the properties of the item
g. Go to **Settings** > **List Settings**



h. On this Window you can change the title, versioning, approval requirement, etc. (see below section on modifying settings.)

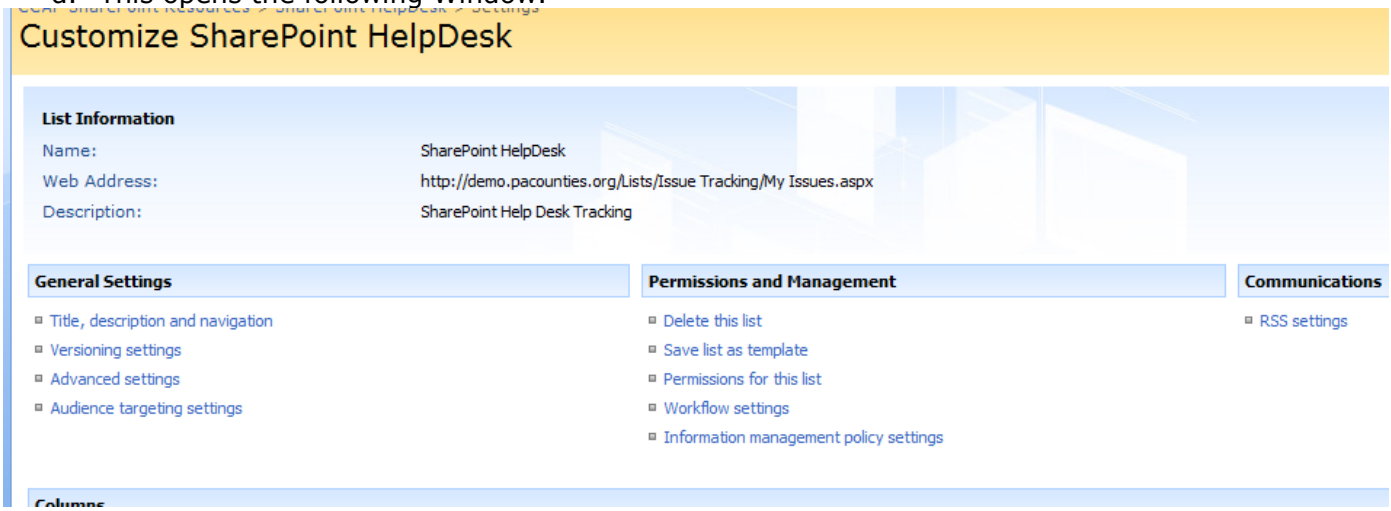
i. You need to create **all your columns** (where the data will be entered.)
j. Scroll down and select **"Create Column"**
k. Select the appropriate type of column you wish to add *(See the following example for common types used)*


Job Postings: HR Director
Close
New Item | Edit Item | Delete Item | Manage Permissions | Alert Me
Job Title
HR Director
Single line of text
County Name
Bucks
Choice menu—dropdown
Job Description
Responsible for overall administration of Bucks County Human Resources Department. Bachelor's degree, with five years of significant Human Resources experience. Public sector personnel experience preferred. Resume must be received by February 14, 2009. Job Number 2009-01AD must be referenced on application. Application an be mailed to: Director, Finance & A
E. Court St., Doylestown, PA 18901 or emailed to: HRCareers@co.bucks.pa.us. EOE
Multiple lines of text—Enhanced rich text
Date posted
2/2/2009
Date and Time
Closing Date
2/13/2009
Date and Time
Contact Person
Karen Nagy
Single line of text
Contact E-mail
kmnagy@co.bucks.pa.us
Single line of text
Address
50 North Main Street
Doylestown, PA 18901
Multiple lines of text
Phone Number
(215) 348-6547
Single line of text
Created at 2/2/2009 8:24 AM by fbaadmin
Last modified at 2/5/2009 2:01 PM by fbaadmin
Close

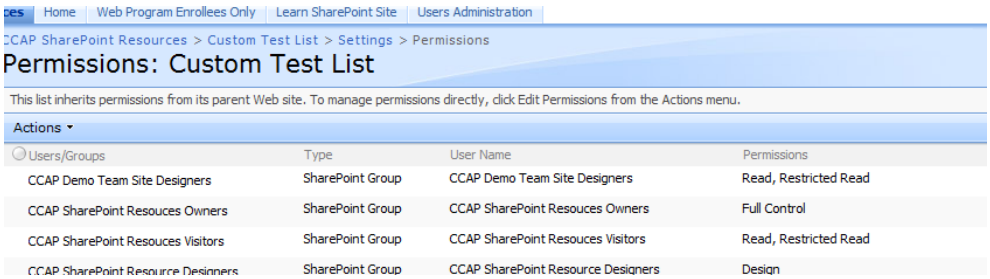
l. Once you have all the columns setup, click OK (or follow the following to set the properties of how your list will work.)

2. Changing A List Settings

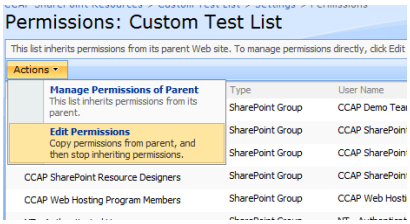
a. When logged in, select **Site Actions** > **View All Site Content**
b. Open the list / library, etc. that you want to change the settings.
c. Click on **Settings -> Library Settings** (or it may say something different depending upon what you entered into).
d. This opens the following Window.



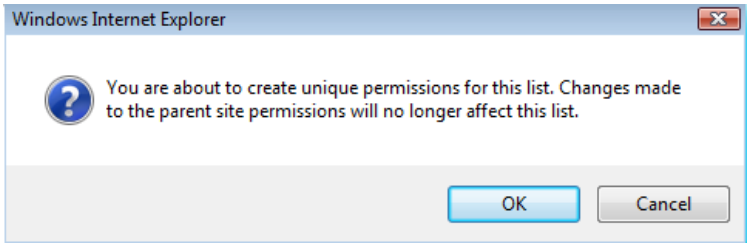
e. The following are the settings and what each of them mean:
   1. ***Title, description and navigation*** = Name your item
   2. ***Versioning*** = unless there is a reason driving versioning, this would normally not be put on a list. It would be beneficial to have it on the Pages and Document libraries.
   3. ***Advanced settings*** = this is where you can turn on content approval and set up how the entry will work. For example:
      (1) Do you want a user to be able to read all items or just their own?
      (2) Would you want them to be able to edit only their own items?
   4. ***Audience targeting settings*** = you can target a list to a group (however, it would be best to do this through navigation)
   5. ***Delete this list*** = Do you want to delete a list?
   6. ***Save list as a template*** = Do you want to keep this as a base to start other lists?
   7. ***Permissions for this list*** = this is where you can set permissions for a list.
      (1) You want to make sure you know the purpose of the list and you can set up whether you want others to contribute (then work that in conjunction with the approval process)
      (2) You can select to have this list available by inheriting permissions from the site (example of what permissions look like if you are inheriting permissions.)



   (3) If you need special permissions on a list or library, you can BREAK the inheritance by:
      (a) Click on **Actions** -> Select **Edit Permissions**


Permissions: Custom Test List
This list inherits permissions from its parent Web site. To manage permissions directly, click Edit
Actions
Manage Permissions of Parent
This list inherits permissions from its parent.
Edit Permissions
Copy permissions from parent, and then stop inheriting permissions.
Type
User Name
SharePoint Group
SharePoint Group
SharePoint Group
CCAP SharePoint Resource Designers
SharePoint Group
CCAP Web Hosting Program Members
SharePoint Group

      (b) This will pop up a warning Window stating you are about to create unique permissions…. Click **Ok**.


Windows Internet Explorer
You are about to create unique permissions for this list. Changes made to the parent site permissions will no longer affect this list.
OK
Cancel

   (4) From here you can set up security as needed.

8. ***Workflow*** = this is where you can set up the approval process (among other processes). (*Workflow can also be developed in SharePoint Designer or Visual Studio)*
9. ***Information Settings*** = this is where policies can be applied to the list / document library.
10. ***RSS*** = this is where you can designate whether an RSS feed should exist or not.

3. Using Metadata In Document Libraries

b. If you would like to use Metadata to organize your information you just need to make sure that you create columns that will contain your categories in the respective document libraries (Site Collection Documents or Documents folders)
c. Examples:
   1. 1st Metadata Column Name = Main Category
      (1) Administration
      (2) Finance
      (3) Human Resources
      (4) Commissioners
   2. 2nd Metadata Column Name = Sub Category
      (1) Policies
      (2) Minutes
      (3) Reports
      (4) Miscellaneous
   3. 3rd Metadata Column Name = Month
      (1) 01-January
      (2) 02-February
      (3) 03-March
      (4) Etc…
   4. 4th Metadata Column Name = Year
      (1) This would match your records retention.

2. Creating Views On Lists

Make sure you are in correct Site when creating lists!!

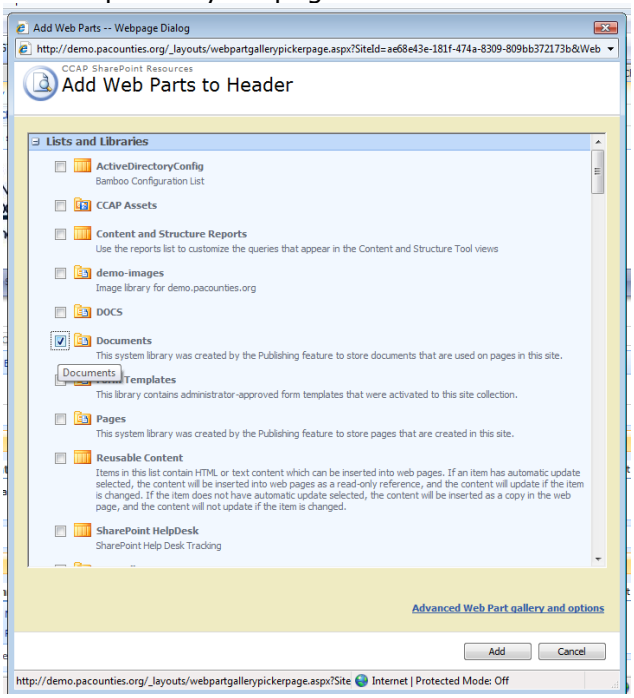
a) While Logged-in, click on **Site Actions** -> **View All Site Content** -> **Select the List** (these instructions work for Document Libraries as well!!)
b) Click on **Settings**
c) Select **List Settings** or **Document Library Settings** (this will vary depending upon what you clicked on.)
d) Scroll the very bottom and select **Create View**
   i) You can select a view created prior (such as Minutes) to use as a 'starting point' (where it says "Start from an existing view"
e) This opens a new Window / Name your view the name of the Category
f) If you selected a previously created view, you should only have to change the "Show items only when the following is true:" section under Filter.
g) You may need to change "Sort" or "Group by"
h) Once done, click **OK**

NOTE: Repeat this for every main category IF you are using MetaData (see special notes below).

3. Using The Views You Create

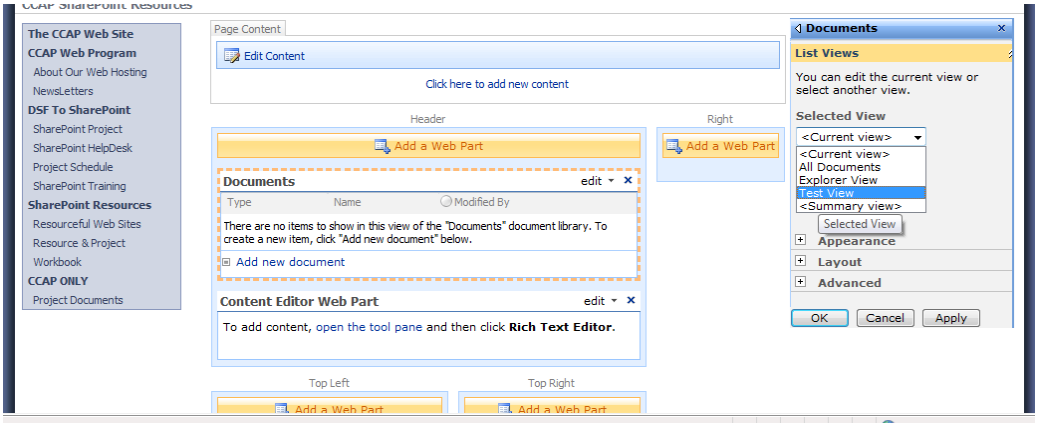
a. Adding the List or Library Web Part

1. This is located under the section called **Lists and Libraries**
2. Select the list or library by clicking in the box
3. Click "**Add**"
4. This will add the web part to your page.


Add Web Parts -- Webpage Dialog
http://demo.pacounties.org/_layouts/webpartgallerypickerpage.aspx?SiteId=ae68e43e-181f-474a-8309-809bb372173b&Web
CCAP SharePoint Resources
Add Web Parts to Header
Lists and Libraries
ActiveDirectoryConfig
Bamboo Configuration List
CCAP Assets
Content and Structure Reports
Use the reports list to customize the queries that appear in the Content and Structure Tool views
demo-images
Image library for demo.pacounties.org
DOCS
Documents
This system library was created by the Publishing feature to store documents that are used on pages in this site.
Documents
Templates
This library contains administrator-approved form templates that were activated to this site collection.
Pages
This system library was created by the Publishing feature to store pages that are created in this site.
Reusable Content
Items in this list contain HTML or text content which can be inserted into web pages. If an item has automatic update selected, the content will be inserted into web pages as a read-only reference, and the content will update if the item is changed. If the item does not have automatic update selected, the content will be inserted as a copy in the web page, and the content will not update if the item is changed.
SharePoint HelpDesk
SharePoint Help Desk Tracking
Advanced Web Part gallery and options
Add
Cancel
http://demo.pacounties.org/_layouts/webpartgallerypickerpage.aspx?Site
Internet | Protected Mode: Off

b. Modifying The List or Library Web Part

1. Click "**Edit**" beside the web part you just added, select **"Modify Shared Web Part"**
2. In the web part panel on the right, you will see a dropdown menu entitled **Selected View**



3. Select the view you wish to have your list displayed as and click **OK** or **Apply**

SECTION 15

SETTING UP WORKFLOW ON A LIST OR CALENDAR

1. What Is Workflow

a. Workflow is the computerized facilitation or automation of a business process, in part or in whole, during which documents, information or tasks
b. Workflow can be as simple as setting up approval for content or an e-mail to be sent upon information entry into a list.

2. Examples of Workflow (Approval Of Content)

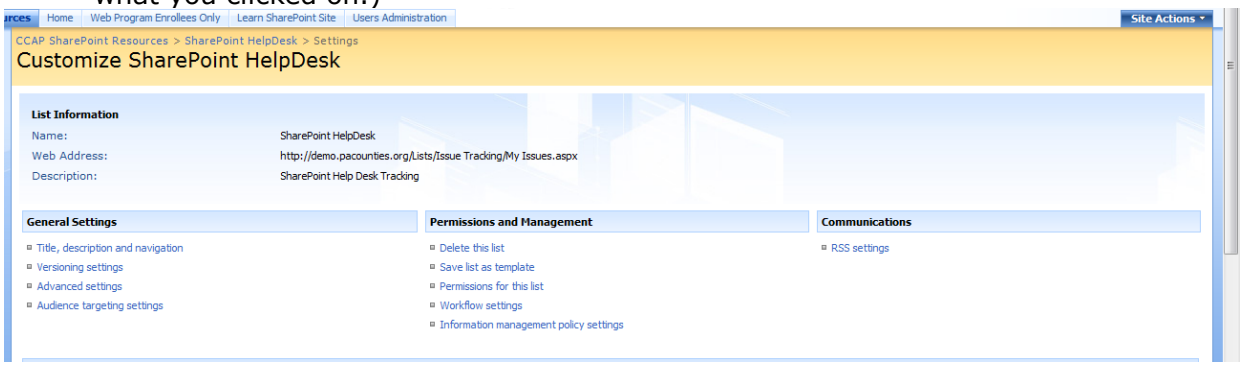
a. **Calendars**
   1. You could have 1 calendar for the county, but have multiple persons updating their respective events to that calendar without the ability to edit or delete events not entered by them.
   2. You could have one person be designated as the "approver" of the event postings.
   3. These events would not show publically unless approved!

b. **Discussion Boards**
   1. You could have a discussion board where anyone who is registered could enter into the discussion.
   2. You could have one person be designated as the "approver (facilitator)" of the discussion postings.
   3. The discussions would not show publically unless approved!

c. **Others Lists**
   1. An example is a job posting list: anyone registered could enter a job posting
   2. No job would appear as publically posted unless approved by the designated person.

3. Placing Workflow on an Item

a. While Logged-in, click on **Site Actions** -> **View All Site Content** -> **Select the List** (these instructions work for Document Libraries as well!!)
b. Click on **Settings**
c. Select **List Settings** or **Document Library Settings** (this will vary depending upon what you clicked on.)



d. You want to change Advanced settings and Workflow settings.

FEATURES YOU CAN USE

1. ALERTS

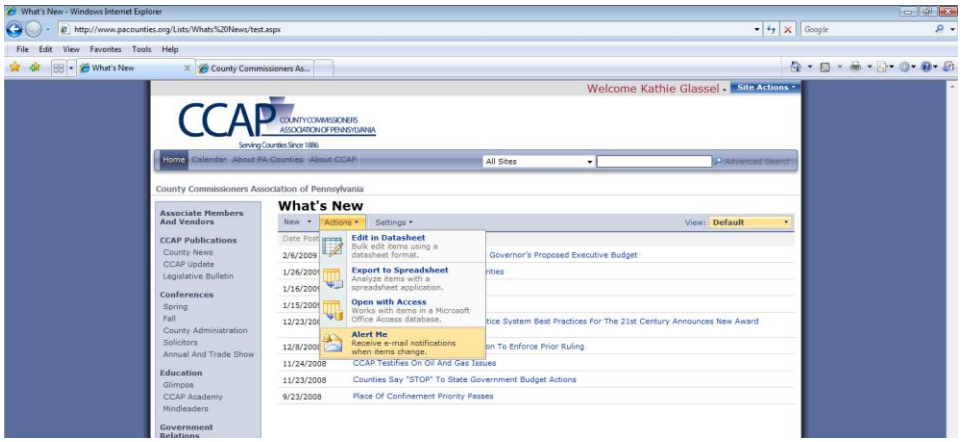
a. How To Use Alerts?

1. Why? Suppose staff or another end user, want to know when there are new announcements posted on this particular Web site. By creating an alert, one can be automatically notified.

2. Example: Using the CCAP Announcements on the Home page, staff wanted to be notified of all announcements through an e-mail alert. This is especially helpful when staff is out of the office and have a Pocket PC.

b. Create a new alert

1. Click on the "Announcements" header on the Home Page.
2. This will take you to the list view of all announcements, as shown below:
3. Click on "**Actions**" and then select "**Alert Me**"

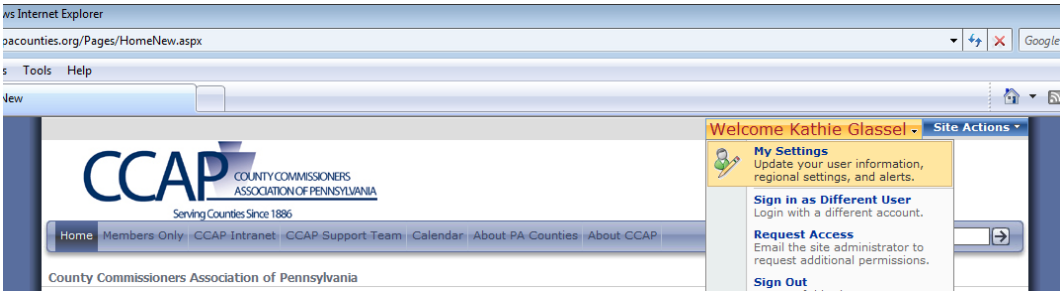


4. At the screen shown on the next page, complete the information needed, including how often you want to receive alerts (immediately, daily, etc) and which types of changes you want to receive alerts on
5. Click on "**OK**".

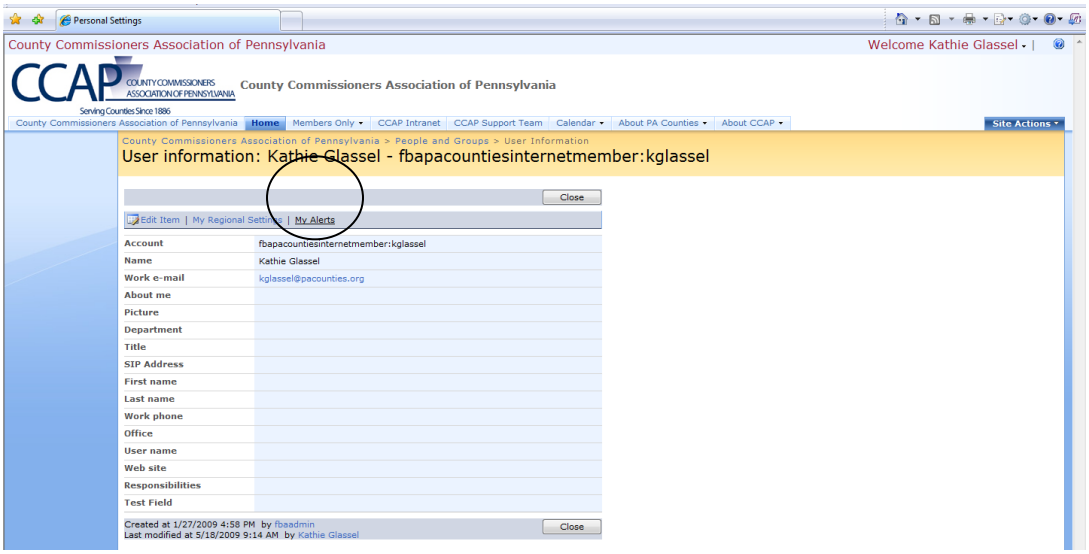
c. Managing Your E-Alerts

1. Sign into the www.pacounties.org Web site by clicking the Sign In in the upper right hand corner of the Window.

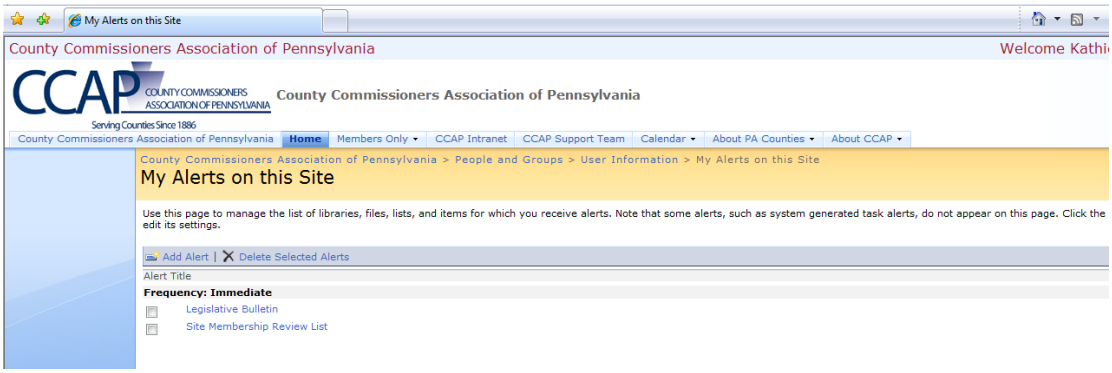
b. Click on the Welcome 'your name', select **My Settings**



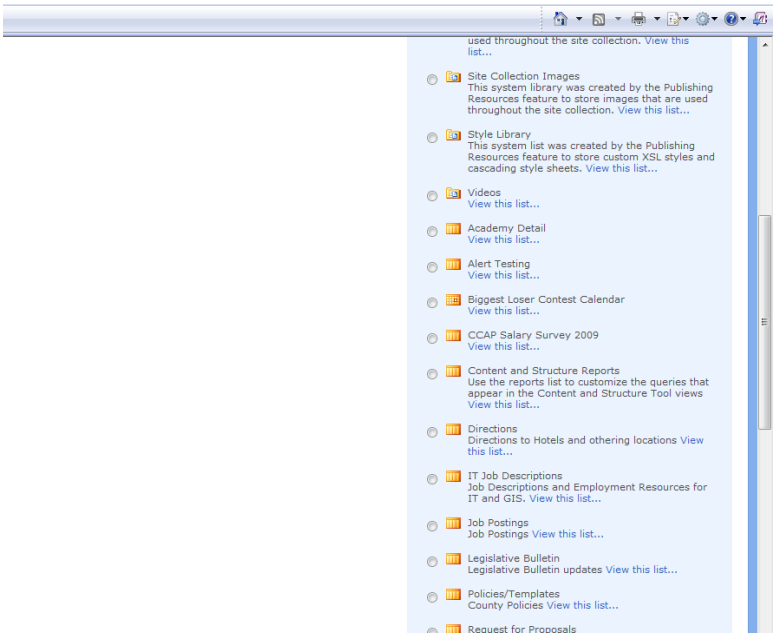
c. Click on "**My Alerts**"



d. On this Window you can either **add** an alert or **delete** alerts.


My Alerts on this Site
County Commissioners Association of Pennsylvania
Welcome Kathi
County Commissioners Association of Pennsylvania
County Commissioners Association of Pennsylvania > People and Groups > User Information > My Alerts on this Site
My Alerts on this Site
Use this page to manage the list of libraries, files, lists, and items for which you receive alerts. Note that some alerts, such as system generated task alerts, do not appear on this page. Click the edit its settings.
Add Alert | Delete Selected Alerts
Alert Title
Frequency: Immediate
Legislative Bulletin
Site Membership Review List

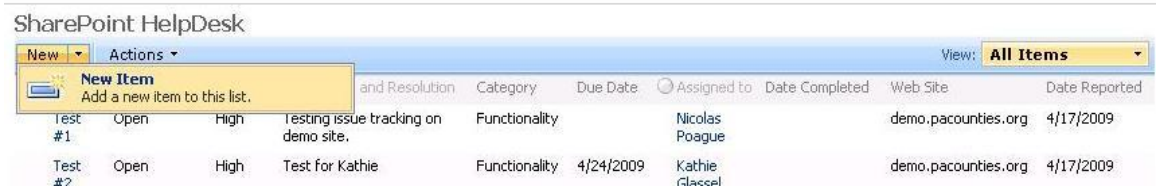
e. To add an alert, click on "**Add Alert**"


used throughout the site collection. View this list...
Site Collection Images
This system library was created by the Publishing Resources feature to store images that are used throughout the site collection. View this list...
Style Library
This system list was created by the Publishing Resources feature to store custom XSL styles and cascading style sheets. View this list...
Videos
View this list...
Academy Detail
View this list...
Alert Testing
View this list...
Biggest Loser Contest Calendar
View this list...
CCAP Salary Survey 2009
View this list...
Content and Structure Reports
Use the reports list to customize the queries that appear in the Content and Structure Tool views
View this list...
Directions
Directions to Hotels and othering locations View this list...
IT Job Descriptions
Job Descriptions and Employment Resources for IT and GIS. View this list...
Job Postings
Job Postings View this list...
Legislative Bulletin
Legislative Bulletin updates View this list...
Policies/Templates
County Policies View this list...
Request for Proposals

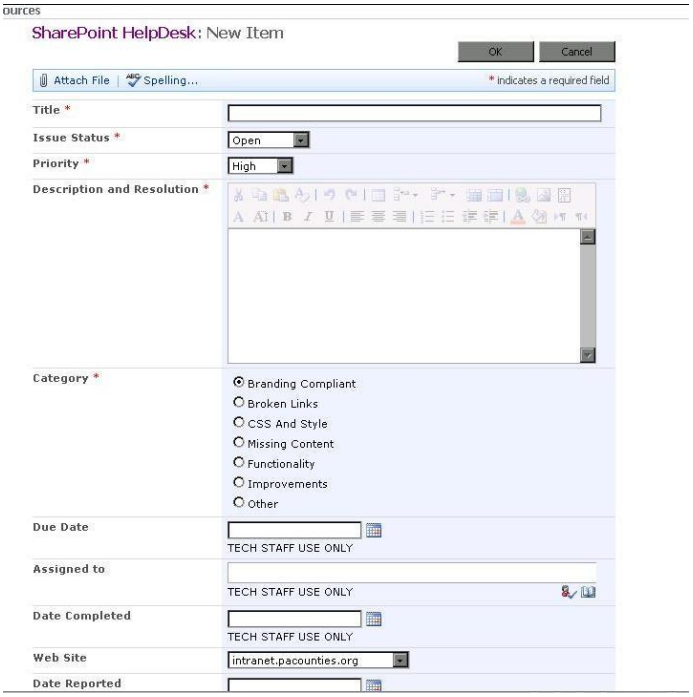
f. Just select the library / list you want to have alerts sent you to from.
g. Scroll to the bottom, and click "Next"
h. Add the alert as you did in "Creating e-Alerts"
i. To delete an alert, on the Window shown under #4 above, just click the item you want to delete and select "**Delete Selected Alert**"

2. Help Desk Tracking

a) Below is the main window for a Help Desk. This is a 'custom list.'
b) This is an example of a feature you could use that allows a 'registered user' to enter their own issues. Workflow has been established to not post them until they have been approved by the designated CCAP staff member.
c) You click on **New**, and then select **New Item** which opens the next form where the information is then added.



d) Once you click **New Item** this window opens and you just enter the information and then click OK and it will send an alert to the person responsible for approving the content.



e) Once the content is approved, it is displayed on the web site.

BONUS: Any person who has appropriate permissions can click on **Actions** and select **Alert Me** so that they know each time an issue has been updated/resolved!

SECTION 17

EXAMPLES OF THINGS TO DO

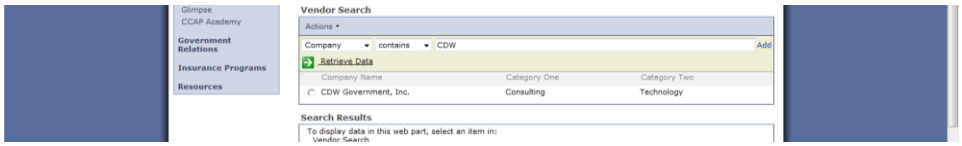
1. Directories

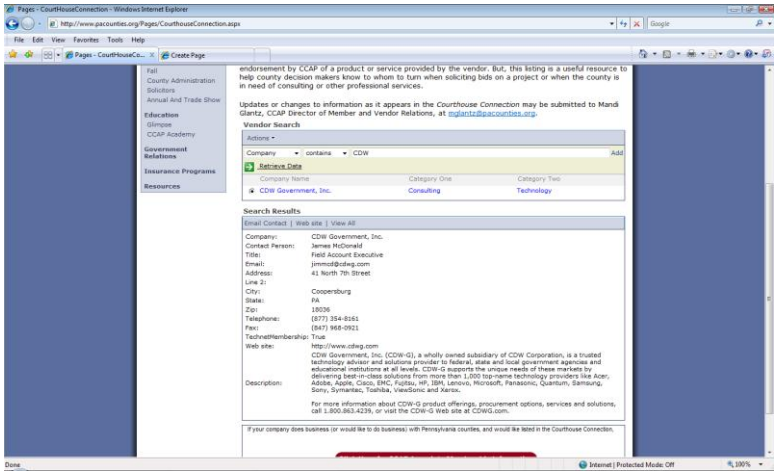
a. The Courthouse Connection
   1. What is it?
      (1) Reflects all the CCAP Associate members.
      (2) Is located at: http://www.pacounties.org/Pages/CourthouseConnection.aspx
      (3) Is based on a "directory" that is built directly from the data in CRM.

   2. How to use it?
      (1) Go to the link above.
      (2) You may search Associate members on various key words such as company, and what type of company, like technology, consulting, etc.
      (3) Once the search category is selected, you then can select whether what your searching for is equal to, starts with, ends with or contains; based on the text you will type in the 'white search box.'
      (4) Then press '**Enter**'

Associate Members And Vendors
CCAP Publications
County News
CCAP Update
Legislative Bulletin
Conferences
Spring
Fall
County Administration
Solicitors
Annual And Trade Show
Education
Glimpse
CCAP Academy
Government Relations
Insurance Programs
Resources
Courthouse Connection
The County Commissioners Association of Pennsylvania is proud of its partnership with companies who do business with counties. The Courthouse Connection is a comprehensive, searchable directory of CCAP's valued associate members. Acceptance of any vendor as an associate member does not constitute endorsement by CCAP of a product or service provided by the vendor. But, this listing is a useful resource to help county decision makers know to whom to turn when soliciting bids on a project or when the county is in need of consulting or other professional services.
Updates or changes to information as it appears in the Courthouse Connection may be submitted to Mandi Glantz, CCAP Director of Member and Vendor Relations, at mglantz@pacounties.org.
Vendor Search
Actions
1 - 20
Company
is equal to
Add
Category One
Category Two
Description
Filter name
Affinity Health Services, Inc.
Consulting
Nursing Home Services
Allan Collautt Associates, Inc. (ACA)
Consulting
Human Services
Allegiant Asset Management
Asset Management
Pension Services

      (5) Once you press enter, it will display the information you can select from.
      (6) Click on the 'radio button' that is beside the selection you want more information about.



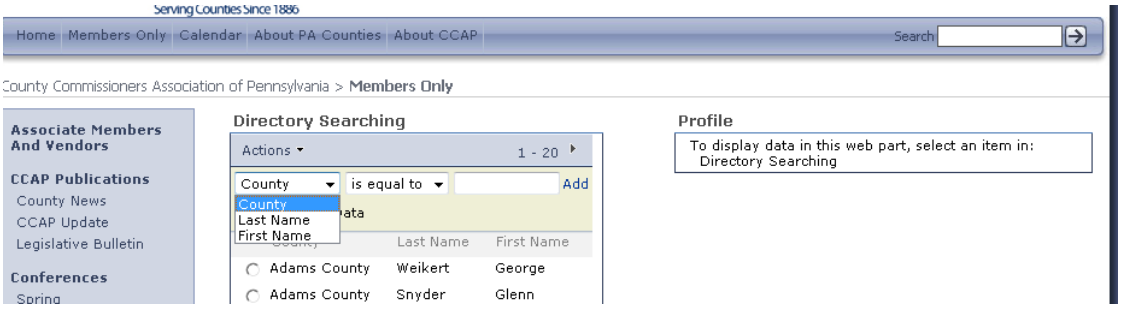


(7) The window will then display all the information on the company selected, as shown above.

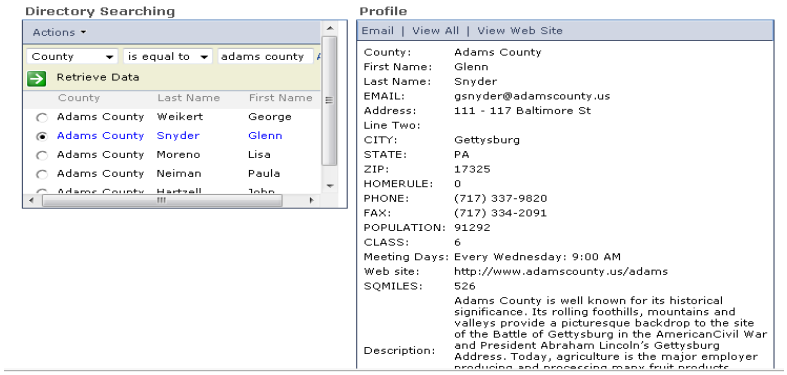
b. CCAP Membership Directory

1. One must be a CCAP member or a CCAP staff person and be logged in to see this option. This directory is located on the drop down for Members Only.

2. At the next screen, you can then search by a county or a member and you can vary whether it's an exact match or contains certain words. Once you select your option for search, you can then select the enter key.

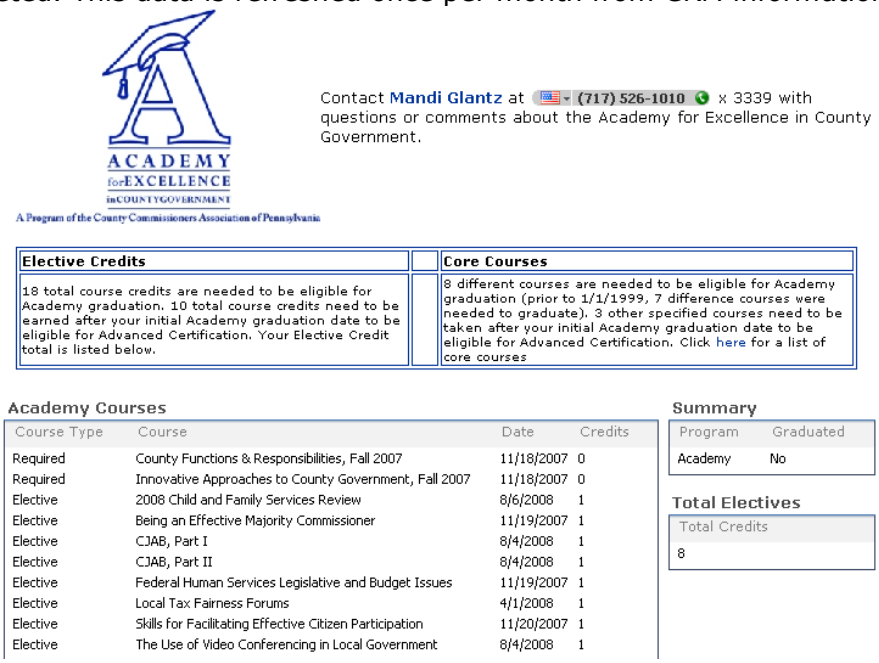


3. From your results, then select a particular individual and select enter. Individual information will be listed about that person, as well as the county they are a member of.


Directory Searching
Actions
County
is equal to
adams county
Retrieve Data
County
Last Name
First Name
Adams County Weikert George
Adams County Snyder Glenn
Adams County Moreno Lisa
Adams County Neiman Paula
Profile
Email | View All | View Web Site
County: Adams County
First Name: Glenn
Last Name: Snyder
EMAIL: gsnyder@adamscounty.us
Address: 111 - 117 Baltimore St
Line Two:
CITY: Gettysburg
STATE: PA
ZIP: 17325
HOMERULE: 0
PHONE: (717) 337-9820
FAX: (717) 334-2091
POPULATION: 91292
CLASS: 6
Meeting Days: Every Wednesday: 9:00 AM
Web site: http://www.adamscounty.us/adams
SQMILES: 526
Description: Adams County is well known for its historical significance. Its rolling foothills, mountains and valleys provide a picturesque backdrop to the site of the Battle of Gettysburg in the AmericanCivil War and President Abraham Lincoln's Gettysburg Address. Today, agriculture is the major employer

4. Note the **E-mail** and **View Web Site** buttons at the top of the profile. If you click on the e-mail button, it will open up your e-mail account and place that person's e-mail in the message.

c. Academy Transcript
   1. This directory is located by selecting the CCAP Academy link under the Education option on the left navigation. Then select "Check your Academy Transcript". The summary screen lists whether a member has completed the Academy Program, is working towards Advanced Certification, and all of the courses they have completed. This data is refreshed once per month from CRM information.


ACADEMY
forEXCELLENCE
inCOUNTYGOVERNMENT
A Program of the County Commissioners Association of Pennsylvania
Contact Mandi Glantz at (717) 526-1010 x 3339 with questions or comments about the Academy for Excellence in County Government.
Elective Credits
18 total course credits are needed to be eligible for Academy graduation. 10 total course credits need to be earned after your initial Academy graduation date to be eligible for Advanced Certification. Your Elective Credit total is listed below.
Core Courses
8 different courses are needed to be eligible for Academy graduation (prior to 1/1/1999, 7 difference courses were needed to graduate). 3 other specified courses need to be taken after your initial Academy graduation date to be eligible for Advanced Certification. Click here for a list of core courses
Academy Courses
Course Type Course Date Credits
Required County Functions & Responsibilities, Fall 2007 11/18/2007 0
Required Innovative Approaches to County Government, Fall 2007 11/18/2007 0
Elective 2008 Child and Family Services Review 8/6/2008 1
Elective Being an Effective Majority Commissioner 11/19/2007 1
Elective CJAB, Part I 8/4/2008 1
Elective CJAB, Part II 8/4/2008 1
Elective Federal Human Services Legislative and Budget Issues 11/19/2007 1
Elective Local Tax Fairness Forums 4/1/2008 1
Elective Skills for Facilitating Effective Citizen Participation 11/20/2007 1
Elective The Use of Video Conferencing in Local Government 8/4/2008 1
Summary
Program Graduated
Academy No
Total Electives
Total Credits
8

NOTES